



### **Preparing for the Strategic Planning Retreat – A Checklist**

Every nonprofit organization should conduct strategic planning on a regular basis, as strategic plans outline what action steps the organization will take in the future to sustain and grow their operation, while adhering to their mission. Many organizations focus attention on conducting the strategic planning session and developing a plan, but don't allocate sufficient time to prepare for the planning retreat. Taking time to adequately prepare for a strategic planning session can help the actual event to run much more smoothly and efficiently, resulting in greater productivity. This article provides a checklist of items to consider in preparing for your next strategic planning retreat.

1. Communicate to board members that it is one of their primary responsibilities to set the direction for the organization, via strategic planning. Board member job descriptions should include this responsibility, and potential board members should be aware of it prior to coming on board.
2. If your organization already has a strategic plan in place, review what goals and objectives have been completed. If there are remaining goals and objectives that haven't been addressed but are relevant to the organization's stability and growth, make sure they are distributed to board members prior to the planning session.
3. Gather as much input from your staff, board members, and other stakeholders prior to the strategic planning session. This is generally done through a SWOT analysis, where stakeholders identify the internal strengths and weaknesses of the organization as well as the external opportunities and threats that the organization may be facing. Stakeholders may also be asked to identify any trends in the field that may impact the organization, positively or negatively. This input is valuable to the strategic planning process, as it can identify areas that need to be developed or addressed. The SWOT analysis results should be shared with the board prior to the planning retreat.
4. Decide when and where you will conduct the strategic planning session, allowing at least a full day for the planning retreat. Make sure that the location is in a quiet and comfortable setting, where board members can relax. Interruptions should be kept to a minimum.

5. Research and hire a facilitator. Ask your colleagues about good facilitators they have used in the past, especially those with a background in the nonprofit field. Meet with the facilitator prior to the planning session to develop the session's agenda, and to discuss the planning process and expected outcomes. Make sure the facilitator has copies of important documents to read so s/he can understand your organization's mission and vision, programs and services, and important issues, prior to the planning retreat.
6. Discuss and make all necessary food arrangements. Decide which meals you are going to provide (depending on your budget), and select a caterer if the facility doesn't operate a kitchen. Make sure that you provide at least two entrée options, and don't forget to survey your board members in advance to see if they have any dietary concerns or requirements.
7. Decide what you will need at the planning retreat in terms of equipment, tools, and supplies. Do you want to have computers and a printer available, will you need an overhead projector and screen, or will a flip chart suffice? Will the facility provide paper and pens or will you need to provide those supplies? Make a list of those items you will need, assemble them a day prior to the retreat, and make sure that all equipment is operable.
8. Ask your board members if they need any type of special accommodation. For example, if someone is visually impaired or blind, they may need their planning materials in large print or Braille. Likewise, if they use a wheelchair, they may need a table that is higher in order for their wheelchair to go underneath it.
9. Determine which documents you want your board members to read in advance. Distribute those documents via e-mail or regular mail, depending on what the board members request. In addition, make sure that these same documents are available at the planning retreat, for reference purposes or in case someone forgets their materials. Documents that you may want board members to read prior to the planning retreat may include, but are not limited to:
  - a. Articles of Incorporation and Bylaws
  - b. Mission and vision statements
  - c. Regular and personnel policies and procedures
  - d. Job descriptions and performance evaluation tools
  - e. Brochures, newsletters, other marketing materials
  - f. Program and service descriptions, eligibility criteria/requirements, forms, statistics, reports, etc.

- g. Annual report(s)
- h. Prior approved budgets and current budget, revenue and expenditure reports, profit and loss statements
- i. Prior strategic planning documents
- j. Prior and current audit reports
- k. Contracts, grants, agreements
- l. Copies of website pages

Taking the time to prepare for your next strategic planning session can help it to flow more smoothly, run more efficiently, and be more productive. This article provided a checklist of items to consider when preparing for a retreat; you may think of other items as well. The important point is to set aside sufficient time when preparing for your planning retreat. A checklist can help you to organize and remember those items that need to be attended to in advance, resulting in a more productive and successful planning retreat.

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If you want to make positive changes in your professional life, and create the job or career you desire and deserve, then working with Executive & Life Coach, Sharon L. Mikrut, is the solution. Although her specialty is in partnering with nonprofit executive directors and managers to maximize their resources in a competitive environment, she is passionate about working with all individuals committed to personal and/or professional growth. Visit her website (<http://www.createitcoaching.org>), Nonprofit Professionals blog (<http://www.createitcoaching.com>), or Empowerment blog (<http://www.createitcoaching.net>) and sign up for her free nonprofit or life coaching newsletter.