



## **Top 11 Ground Rules for Conducting a Strategic Planning Session**

Conducting a good strategic planning session is critical to the success of a solid strategic plan; one that includes specific and measurable goals and objectives, providing a clear direction for the organization. To ensure that the actual planning retreat is as productive as it can be, ground rules should be established and discussed prior to commencement. This article provides a list of 11 ground rules I believe are imperative in managing a successful planning retreat.

1. Present the written agenda or schedule for the day so everyone is aware of the day's activities. Make sure to discuss meal times and breaks, ask if any agenda items need clarification, and ask if there are any additions to the agenda. There are times when an addition may be requested but is not necessarily related to the strategic planning session. If this is the case, put the issue in a "parking lot." If time remains at the end of the session, you can either discuss the item at that time or put it on the agenda for the next board meeting.
2. Ask participants to be fully present and engaged for the entire session. Their attention should be focused on the day's agenda and activities, not on work or personal issues.
3. Ask participants to turn off their cell phones for the duration of the planning session. This will prevent unnecessary interruptions, and keep people from reading text messages or texting. Interruptions should be kept to a minimum, as they can be disruptive and break the flow of conversation.
4. Ask participants to be respectful of each other's comments, ideas, and suggestions, whether they agree or disagree. As you would want someone to honor your thoughts, treat them in the same manner. In addition, you may disagree with what someone is saying but it may jog something in your mind that is important to mention.
5. Make sure each participant is given the opportunity to fully express his/her ideas without interruption. If you are formulating a thought in your mind while someone is speaking, you are truly not listening to that individual. Make sure the individual speaking is able to complete his/her thoughts before you express your own.

6. Depending on the time designated to each agenda item, you might have to limit each person's comments. In advance, let people know if there is a time limit regarding how many minutes they have to express their thoughts regarding a specific item. If you set a time limitation, make sure someone is appointed as the timekeeper.
7. Communicate that no idea is a bad idea. Participants should feel free to brainstorm. Some of the best ideas come from spontaneous thoughts, as one thought can be a springboard for another thought.
8. Avoid "we did that in the past and it didn't/won't work." Stifling someone's thoughts can prevent them from suggesting others. In addition, while an action or effort didn't work in the past, it may work today with some adjustments.
9. Suggest that if you see someone who is silent or not contributing, ask for their input and ideas. One way to prevent people from remaining silent is to go around in a circle and ask them for input.
10. Discuss confidentiality, as some discussions should be kept confidential (e.g., discussing a problem employee, a collaborative partner who is not pulling their weight) . Confidential items should be decided in advance. If you feel it is necessary, you can request that participants sign a confidentiality statement prior to beginning the retreat.
11. Make sure that participants have the organization's mission statement in front of them and continuously look at it throughout the planning session. Remind them that any ideas or suggestions for planning goals and objectives should relate directly to the mission statement.

By discussing and establishing ground rules for the strategic planning session, it will help the retreat to run more smoothly and efficiently, resulting in increased productivity. By establishing ground rules upfront, you are laying the foundation for spontaneous input, fresh ideas and approaches, open and honest communication, and creative problem solving. This will not only help you in managing your planning session, but it will also help you to develop a solid strategic plan.

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