



Quick and Important Tips for a Successful Strategic Planning Event

Based on dozens of strategic planning sessions, we've come up with this checklist to ensure your planning is a success for your organization and its people.

- Include EVERYONE! This initiative might have begun with the board, and after that - right from the start, it should include management, staff and board.
- Inclusion = engagement; ask for participation, explain the 'why' behind the event. Ideas:
 - Why do strategic planning
 - Are there any key issues the organization is facing that needs resolution, direction or special focus
 - What dates and times work best for everyone to hold the sessions
 - Who should attend
 - Is there extra pay or time off in lieu
 - What the plan will mean to the organization and those involved/affected personally in their roles
 - How the process is designed and what should the participants expect
 - How will it be implemented moving forward
- Hold the event off site if possible
- Food - Snack, Refreshments (caffeinated & decaf), Lunch (accommodate food sensitivities)
- Outdoor/Fresh air breaks, if possible (15 minutes can do wonders)

Post-Session Thoughts

- Collectively determine who will be engaged in what follow-up activity (the more ownership individual participants feel over the plan priorities, the more they will stay engaged and follow through)
- Make sure everyone feels heard before the plan is finalized. Remember, you are asking people to commit to a three year plan that most certainly will affect them, and in the spirit and practice of collaboration, everyone needs to be heard.
- Ask for feedback about how everyone found the event and process
- Have team leads introduce the plan to their teams and collaborate on ways to implement it
- Report back to the team on a regular basis about the plans progress
- Report on the plan at every board meeting - adopt an agenda that includes the strategic planning report

There you have it.