



## The Perfect Planning Retreat Civic Strategies' 10 Essential Ingredients

**L**eadership boards of all kinds – city councils, county commissions, chamber boards, downtown authorities, school boards, economic development groups and so on – are vital to our communities. But they have some characteristics that can hamper their performance: They are usually part-time boards (so members have many things on their minds), turnover can sometimes be high and, let's face it, local politics can be fierce.

The results can range from disappointment – members having difficulty coming to agreement or working well with staff – to disaster, when they go to war with one another.

The solution? Ultimately, it's to get board members to agree on a commonly desired outcome (a vision for the community), a mission (the organization's or government's role in achieving the vision) and a set of goals whose progress can be measured. And another thing: They must learn ways of respecting each other's opinions, searching for common ground and, in the end, working effectively together.

So how do you accomplish this? A good place to begin is with a well-designed, well-managed annual planning retreat. At Civic Strategies, we think there are 10 essential ingredients to designing and managing the perfect retreat. Do you have to include all 10? Strictly speaking, no. But if you want a truly effective annual retreat, you have to accomplish the intentions of these ingredients. (Example: If you don't want to go out of town – see Ingredient 1 – you still have to free your leaders from distractions and get them in a positive frame of mind.) Be careful, then, of shortcuts. They may not be the shortest routes.

### The Essential Ingredients

1. **Go and see.** Combine the retreat with a visit to a city that's successfully dealing with a problem the board is concerned about. There are two benefits to the go-and-see approach:



PO Box 15250 • Atlanta, GA 30333 USA  
Tele (404) 873-5343 • [info@civic-strategies.com](mailto:info@civic-strategies.com)  
[www.civic-strategies.com](http://www.civic-strategies.com)

It gets your board out of town and away from the distractions (and divisions) of home. And it shows them success. And that positive frame of mind is important in creating the perfect retreat.

2. **Make it a two-day event spread over three days.** If you're going out of town, you'll need a two-day retreat to make the travel worthwhile. Our advice: Begin the retreat in the host city on Thursday at noon, work all day Friday, and conclude on Saturday at noon. That would give you four or five hours on Thursday afternoon to learn about the host community, all day Friday for planning work, and Saturday morning for relationships and team building. Bonus: The board gets two evenings together for dinner and socializing, which are important to building cohesion. (Note: Participants would travel on Thursday morning and Saturday afternoon.)
3. **Interview participants in advance.** If it's a small board, interview all participants. If it's a larger one, interview a cross-section. The aim is two-fold: to get members' issues and concerns on the table, which helps with meeting design, and to build interest in attending the retreat. Why is building interest so important? Because some elected officials and community volunteers will need persuading to give up three days (including a Saturday) to participate in a retreat. By interviewing participants in advance, you build their interest.
4. **Send out a pre-retreat briefing document.** The document is part report and part agenda. It lays out the members' issues and concerns, offers background on the host community (and the issues it has in common with your community), and spells out how the retreat will proceed. Thus, it reassures those already committed to the retreat that it's worth their investments of time and energy and helps persuade the wavering.
5. **Devote most of the retreat to vision, mission and goal setting, but reserve part of it for strengthening relationships and team building.** Just one thing: Don't be hokey about the relationships part. Many people – and most community leaders – have little patience for “touchy-feely” or role-playing activities. So find appropriate ways of addressing interpersonal issues and building cooperation.
6. **If possible, work in small groups.** Small groups allow for greater dialogue, creativity and teamwork. How large does a leadership board have to be to have small groups? Generally, nine members or larger. (Sorry, you can't place staff in the small groups, although staffers can observe and offer information, as needed.)
7. **Begin with vision, move to mission, then to goal setting.** Goal setting is what good boards do; they set direction and expectation – and that establishes the organizational “what.” Staffs supply the “how.” But the way to get the goals is to begin with a vision for the community and a clearly defined role for the organization or government. In early retreats – or with groups with a lot of turnover – the vision and mission parts can take awhile, as members wrestle with unfamiliar ways of thinking. But once they establish the vision and mission, you'll be surprised how quickly members can agree on goals.
8. **Find the right place in the agenda for staff briefings.** If this is an early planning retreat (or the first since a major change in membership), you may want to wait until the group has had a chance to work on vision and mission. If it's a regular event and the group is largely in agreement on vision and mission, you may want to begin the planning portion of the retreat with a staff report on progress toward last year's goals. Here's where the

**Use part of the retreat for relationships and team building. Careful, though: Don't be hokey.**

- pre-retreat interviews will be important: They'll tell you if the group is still in agreement on vision and mission. And that will tell you how to schedule the staff briefings.
9. **Send out a comprehensive, objective post-retreat report.** Memories fade fast, so timing is important to post-retreat reports. Good rule: Get the report to participants in two weeks' time or less. If members request additions or revisions, turn those around fast too. The point of a retreat is not just to make decisions but to gain commitments – and the post-retreat document is both a reminder and a guide. Months later, members will revisit it to remind themselves of the vision and mission and recall the goals they set.
  10. **Do a six-month review.** Memories and commitments fade, and new issues arise. The best way of recommitting a group to vision, mission and goals (and adding new goals due to changed circumstances) is to schedule a six-month review. This can be a brisk, three-hour meeting (noon to 3 p.m., say, including lunch), since you'll be revisiting the retreat, not doing a new retreat. But this six-month review can be a valuable way of recommitting the group to its goals – or making important modifications.

### Do It Yourself?

Could you design and manage a perfect planning retreat on your own? Well, yes, but it would be difficult. Here's why:

- There's the time commitment. As you can see, designing good planning retreats is time consuming, with the interviews, reports and planning.
- There's also the facilitation challenge. One value of an experienced community consultant is that he or she understands group dynamics – and can lead your board through the inevitable difficult spots.
- It helps to have someone who's knowledgeable – but with a distance. Hard to admit, but we sometimes have trouble seeing our own situations clearly. So it can be valuable to have a knowledgeable outsider helping your leaders see opportunities and answers that might otherwise elude them.
- Then there's the objectivity thing. Outside community facilitators are usually seen as more objective than staff members and, in some cases, more objective than local facilitators (who may have voted for or against some of the people involved in these issues).
- Finally, you need to signal how important this planning retreat is to your board members. When you hire a professional community consultant – someone who has designed and managed retreats for a wide variety of communities and leadership groups – you're sending that signal.

**An experienced consultant will understand group dynamics. That could be important.**

### About Civic Strategies

Civic Strategies, Inc., is a collaborative and strategic planning firm that helps local governments and civic organizations make important decisions. Over the years, we've designed and facilitated scores of planning retreats. To learn about Civic Strategies' services, call us at (404) 873-5343 or e-mail us at [info@civic-strategies.com](mailto:info@civic-strategies.com).