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## Suggested Checklist for a Successful Planning Retreat

- **Determine participants:** The entire board of directors and the executive director are essential participants. Other participants should be key staff plus other organizational leaders who are visionary and positive team players. If you have a large board and then add staff and other key leaders to the strategic planning team, your group may become rather unwieldy to effectively generate quality discussion. You may need to do advanced discussions with stakeholder groups or focus groups to gather input from a broad spectrum, and then try to keep the planning team to a manageable size (no more than 24 if possible).
- **Determine date:** Ideally, you will identify a date when every member of your board of directors, key staff, and other invited leaders can attend. Buy-in from the entire board is essential – having each member in attendance is the best way to assure that. Strongly consider having the board and other planning team participants arrive the night before the retreat for dinner and a social time/activity to get everyone “loosened up” and comfortable with each other. If your budget allows, pay for the team’s hotel rooms. Having them come in the night before builds team spirit plus allows you peace of mind to know you can start on time in the morning. Enhance the experience with good food and snacks. If you’re having a two-day retreat, build in casual evening team-building time with activities like boat rides, bowling, dinner theatre, or BBQ. Being on a nonprofit board is hard work and the benefits of building the team outside of the regular agenda are often overlooked.
- **Determine location:** To minimize distractions, consider a location other than your organization’s office. The location should be comfortable and conducive to the important work that has to be done; and should be far away from the distractions of our normal business and family lives. The facility should have tables, comfortable chairs, good audio-visual equipment, and plenty of room to allow dividing into small groups. Consider a resort, hotel, community center or camp that has plenty of room. The proper setting will require an investment of dollars, but will be worth it to have everybody comfortable and focused.
- **Gather and disseminate information:** Good planning requires good information. Information should include important data such as the organizational budget; financial trends; donor or member participation in activities and related trends; results of a constituent survey or needs assessments; and perspectives shared in community forums or member focus groups. All of this information should be distributed to planning team participants well in advance of the retreat and they should be expected to read it in advance. Other items you should consider distributing: bylaws, policy manual, previous plan, organizational chart, and pertinent demographic studies or other research including media reports on current trends.
- **Choose a qualified facilitator:** We hope you choose Nonprofit Leadership Solutions. But if don’t choose us, we still recommend that you engage a third party facilitator. Having your president or executive be the facilitator is unfair to them and the group. The facilitator needs to be neutral and sometimes has to play devil’s advocate – thus your officers will be prevented from full participation if you ask them to facilitate. The facilitator needs to both shepherd the group and hold their feet to the fire.