



Community and Economic Development in North Carolina and Beyond Blog: Annual Planning Retreats

By CED Guest Author

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Have you made your resolutions for the New Year yet? 'Tis the season to be thinking ahead to next year and beyond!

Whether you are an elected official or the director of a community or economic development organization, you will be challenged as a leader to set vision and direction for your community, convene others that can influence the future, and model strategic leadership so other organizations can understand and appropriately align with your vision.

Many governing boards and organizations begin this work with a one to two day retreat to establish broad community development priorities, focus on developing specific economic development strategies that are consistent with your community's philosophical principles and practices, or help members/boards get to know one another, begin pulling in the same direction, or develop new ways of working together.

This posting considers some basic elements of putting together a successful retreat, including a link to a retreat planning checklist.

Retreating from the normal course of business allows you a more relaxed setting and encourages one to think strategically: a chance to consider how and why you do your work. Ideally, participants will have open and frank discussion about critical issues facing their community and their working relationships. Both substance and process are important to getting your work done. A retreat should be a balance of how you work and what you want to accomplish.

How do you know what you should talk about at the retreat?

No doubt most of us can produce a long list of issues we would like to learn more about or discuss at a retreat. It is a harder chore, however, to craft an agenda to produce effective discussion, decision, and follow-through. As you progress through your retreat planning, you'll want to consider the following:

- What are your objectives for your time together, and does everyone agree?
- How should the time be structured in order to meet those objectives?
- How much information is needed, when, and from which sources for members to feel they can be fully informed decision-makers?
- Is this a one-time event or part of a series of meetings designed to help the group improve its functioning over time?
- How can the group benefit by using a facilitator, and who might be best suited for your group?

More often than not there are multiple purposes being served by your retreat time. Careful thought and planning is needed as your group sorts through purposes and suggests a sequence for the discussion. As you establish an agenda and time frame for accomplishing this work, be purposeful and realistic about allocating the group's time. A trained and experienced facilitator can be helpful with this task.



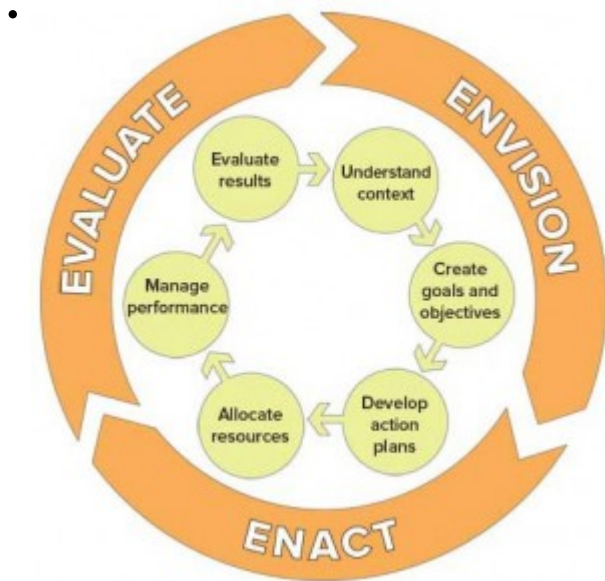
One temptation is to focus solely on getting tasks accomplished, decisions made, or plans in place and fail to assess how well the group actually works. Ineffective working relationships or behaviors can stymie a group, make it dysfunctional, or otherwise hinder the actual accomplishment of the tasks. Planning an agenda that meets your group's needs is best done by considering not just what the group wants to accomplish in their time together, but also by paying attention to the relationships and the dynamics within the group.

Here are some circumstances that might warrant dedicating part of the retreat's focus to improved, more effective working relationships:

- Have there been changes in the groups' informal or formal leadership that might affect previously understood and established routines for how things get handled within the group, such as how items get placed on an agenda or being clear on what rules of order will be used for formal meetings?
- Are there uncomfortable personal or group dynamics that are hampering the group's ability to be effective?
- Is there a new employee or appointee who might be unclear about the group's expectations on how routine matters get handled?
- Are relationships with other community and economic development groups, business leaders, or neighboring jurisdictions working as well as they should? Or are they hampering your group's ability to do its work?
- Are incomplete, indirect, or misunderstood communication patterns disrupting effective working relationships?

What do I do with the retreat results?

Strategic plans remain dreams if not transformed into specific actions and operations. A key focus for any successful community or economic development group is to ensure that core activities and functions work in congruence with organizational or community strategies. If daily operations do not reflect the organization's strategies, then the benefit of thoughtful guidance is lost. Furthermore, projects which do not align with the organization's vision and goals potentially waste public resources.



Integrate the work from the retreat with the work of your

organization, e.g., match goals, strategies, or outcomes with specific departmental work, apply as part of your budget preparation, document expectations in performance evaluations and review processes.

- Commit to follow through at the retreat.
- Identify issues for action, prioritize those issues, and select three to five areas for action.
- Establish performance targets for each area.
- Designate someone to champion, implement, and monitor progress.
- Communicate your work through press releases, newsletters, citizen list serves, or other channels.



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- Involve other key community partners that are critical to achieving your work. e.g., local government official, neighboring jurisdiction, community-based organization.
 - Incorporate retreat outcomes into your regular planning cycles, work plans, or work sessions.
 - Refer to your earlier work as you evaluate the progress of the board, manager, and others.

If you are seeking assistance with planning your board's retreat, SOG offers these services. Visit this web page for more information. www.sog.unc.edu/programs/electedboardretreats/