

Strategic Planning Services for

ASSOCIATIONS AND CHAMBERS

FACILITATION
•
RETREATS

Supporting the Board's Role in Looking Forward

THE NEED FOR STRATEGIC PLANNING

The essential duties of a not-for-profit board are to plan for future success, allocate resources, and support volunteers and staff in operations and implementing plans. A key step in this responsibility is the crafting, reviewing and refreshing the strategic plan.

STRATEGIC PLAN OUTLINE

Bringing a fresh perspective, experience and knowledge, Russ facilitates a three phase model of *Purpose, Scanning, and Strategies* as the components of the thinking exercise. He serves as a sounding board and coach.

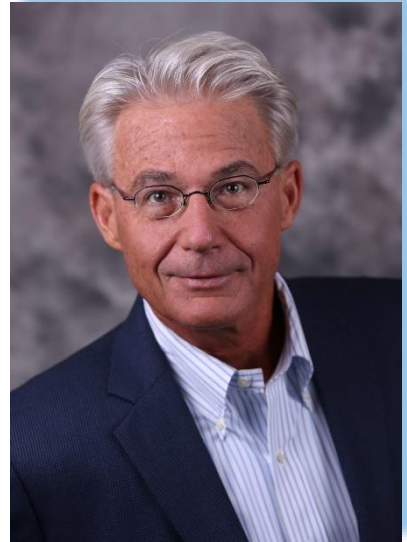
APPROACH, PROCESS, AGENDA

Most boards find that a one or two day retreat provides time for collaborative thinking, dialogue and decision making. It also provides for connections and relationship building. The agenda is supported with pre-event surveys and interviews.

- A. Confirm or refresh the organization's **Mission, Vision and Values Statements**
- B. Examine the industry's **External Environment**:
 - Economics, Regulations, Competition, Technology, Disruptive technologies and alternatives
- C. Review **Internal Operations** through a SWOT analysis:
 - Organization Strengths, Weaknesses, Opportunities, Threats
- D. Restate the **Organization's Value Proposition** – determine identity for excellence for market leadership
- E. Develop **Key Strategic Goals** achievable for the next two to four years
- F. Advance discussions to determine **Tactics, Actions and Program Plans**
- G. Align Committees, Work Groups, Task Forces and Staff with **resources and assignments**

DELIVERABLES

Russ will create and deploy a leadership survey for key leaders within the organization and will conduct one-on-one telephone interviews in advance of the event. Utilizing survey insights and through a variety of group facilitation techniques, Russ will develop and manage the agenda to guide and discover a refreshed vision and action plan for the organization. Following the event, Russ provides a written draft of the strategic plan including an outline of the critical action items for execution by the board, committees and its staff or management firm.



ABOUT RUSS

Russ has been a lifelong, 30 + year practitioner of leadership holding positions as CEO of an international real estate association and President of the Magnificent Mile Association. He holds the Certified Association Executive (CAE) issued by the American Society of Association Executives and is a member of the executive faculty for the US Chamber of Commerce IOM Program. Russ has presented countless sessions and programs for organizations around the world for more than thirty years.

Client and Participant comments

- *"Russ's passion and knowledge of association leadership was so helpful in guiding our thinking exercise."* – Board Chair
- *"He took our free flow thinking and dreams to a vision and plan! He was the right choice."* –Participant
- *"We finally are working beyond what to do in the near term."* –Participant