

Housecalls at Work

Answers from Dr. Insite

BY SHEILA L. MARGOLIS
AND AVA S. WILENSKY



Dr. Insite is an ongoing column to address people-related issues in nonprofit organizations. For answers to your workplace issues, please e-mail your questions to DrInsite@coreinsites.com. All responses will be handled confidentially.

Dear Dr. Insite:

Strategic planning retreats are an ongoing focus for associations. The time we spend together is always rewarding. However, once people leave the retreat, they also seem to leave personal responsibility for the plan behind. Is there a way to encourage Board members to be committed to plan implementation?

Dear Strategic Thinker:

Gathering information from participants before the actual strategic event may solve your problem. Typically, strategic retreats bring participants together for an intensive period of time to create a plan. Although this method may appear expedient, it has a number of pitfalls. First, time can be wasted in political positioning or bantering rather than obtaining useful strategic data. Second, individuals may feel uncomfortable speaking in large groups, leaving rich data sources untapped. Alternatively, one very vocal person's view can determine a focus that is not reflective of the group. Furthermore, strategic retreats can be exhausting, wearing participants out rather than driving them to action. Once the planning event concludes, participants return to their daily lives without personal ownership of the strategic plan.

An alternative approach is to collect data and create a preliminary plan prior to the

retreat. To gather thorough information and generate excitement around a strategic plan, all members must participate. Strategic information is gathered through a tiered system: Interviews are reserved for the most involved members; focus groups are for those who have slightly less impact; and surveys are for the remaining stakeholders. The collected data are analyzed and compiled into a plan for presentation to the group at the retreat. This allows members to respond to and fine-tune a coherent document to which they have already contributed. Additionally, more retreat time is available for participants to commit to action items that support strategic goals and begin their work in plan implementation. ●

*Sheila L. Margolis and Ava S. Wilensky hold doctoral degrees in Human Resource Development. As the principals of CORE InSites® Inc., they are well-known organizational development experts specializing in organizational strategy, the strategic use of human resources and program evaluation. Additionally, Margolis and Wilensky are authors of *There Is No Place Like Work: Seven Insights for Creating a Workplace to Call Home* (OD Press, 2004). Call them at (404) 255-4007 or visit online at www.coreinsites.com.*