



Louder NonProfit Strategies Planning Process: More Than Just a Board Retreat

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Louder NonProfit Strategies, LLC was founded out of a concern that smaller organizations who lacked big budgets were missing out on the benefits of an outside facilitator to lead board orientations and strategy sessions. Recognizing that these organizations require more support than an “in and out” one day retreat, our proposals generally include the following:

- 1) A review of key organization documents, including governing documents (bylaws, policies and procedures, etc.), financial statements, annual reports, past strategic plans, and program of work (what your organization does each year). Not all organizations have all documents, but the review allows an opportunity for the facilitator to better understand the challenges facing your organization and to offer input on the documents themselves based on industry best practices.
- 2) Consultation with volunteer and staff leadership to develop a strategy session agenda that include any pressing concerns, whether in board governance, program inclusions, or resource concerns, and identify the questions on which you seek board input. These sessions generally include a consultation with the chief executive, sometimes with other staff, and with the chief executive, chairman, and incoming chairman. Sessions can be held by phone, video conference, or in person, depending on location and the desires of the group.
- 3) A full day (6 hours recommended) planning session with your board of directors and invited guests focused on the issues identified during the review of documents and leadership consultations. The storyboarding process is used for this session, encouraging feedback not just from the most vocal members of your board, but also creating space for quieter members who may need time to think or are hesitant to speak up (insightful ideas often come from these members). Storyboarding allows ideas to be rearranged and recategorized throughout the planning process, linking concepts together and prioritizing elements, to arrive at a final plan.
- 4) Complete summary of planning session results and board comments, including those not adopted for the current plan. Deliverables include 1) comment summary with prioritization, 2) draft one page plan with key areas of focus, deadlines, and responsibilities for regular (at least quarterly) review by the board, and 3) action plan expanding on plan with step-by-step implementation suggestions and pertinent outside resources. Note that all documents are drafts to allow your board to make any needed adjustments based on organizational resources and priorities before adopting for action.
- 5) Up to two hours per month of consulting on topics of your choice within one year of planning retreat. These are often used to resolve questions about achieving plan results, governance best practices, orienting committee chairs or staff to the plan and their role in it, and/or mentoring the chief executive or other staff.

All proposals are crafted with your organization’s specific needs in mind. Contact Claire Louder today to learn more about how we can help your group make a difference in your community!