Strategic Planning Retreat Checklist

Use This Guide for Retreat Planning, Execution, and Follow-Through

1

Identify the scope of your retreat **objectives**

Not all retreat objectives are created equal. While certain goals, such as unifying stakeholders and gathering input, are most effectively addressed through focused conversations with participants, other objectives can be more cost- and time-efficiently addressed through alternative channels.

❑ Define your retreat objectives

❑ Determine if the types and number of identified objectives are appropriate for a retreat setting

❑ Identify alternative channels for achieving different types of objectives

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Plan for and design your retreat

Effective retreats connect organizational objectives to the activities done at the retreat. Preparation for the retreat should begin well in advance, with interim deadlines for the creation of retreat content and enough time to walk through the proposed agenda to ensure effective use of limited retreat time.

❑ Balance retreat planning with other responsibilities by setting a timeline

❑ Delegate ownership of parts of the retreat to a team

❑ Simulate the retreat agenda in advance of the event to identify gaps in content

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Prepare **educational materials** for attendees

Preparing for a retreat is just as important for participants as it is for the retreat leader. Leaders who create pre-reading materials use finite retreat time to gather feedback and insights rather than teach background information that could have been shared earlier.

❑ Identify what types of content are best shared before, during, or after the retreat

❑ Select the vehicle for sharing background information that is most likely to engage your attendees

❑ Gain attendee buy-in for pre-retreat reading or activities

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Select retreat **exercises** that advance your objectives

Progressive colleges select retreat exercises that include a variety of college functions to anticipate and prepare for market uncertainties. Interactive activities build buy-in from all retreat participants while identifying previously hidden opportunities and threats.

❑ Minimize didactic lecture in lieu of sessions that elicit attendee feedback and promote cross-functional collaboration

❑ Gauge the likelihood of different market "shocks" occurring in your market and identify early indicators to look for

❑ Anticipate stakeholder responses to market changes

❑ Identify proactive and reactive strategies for each potential stakeholder response

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Follow through on insights, follow-up with stakeholders

Retreats surface valuable intel, develop productive ideas, and align stakeholders, but to be effective those outcomes have to turn into results. Post-retreat leadership converts good ideas into college-wide change.

❑ Make retreat insights actionable

❑ Drive accountability

❑ Keep participants engaged in next steps