

NOVEMBER / DECEMBER 2005

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# The Executive

California Society of Association Executives

CAISAE

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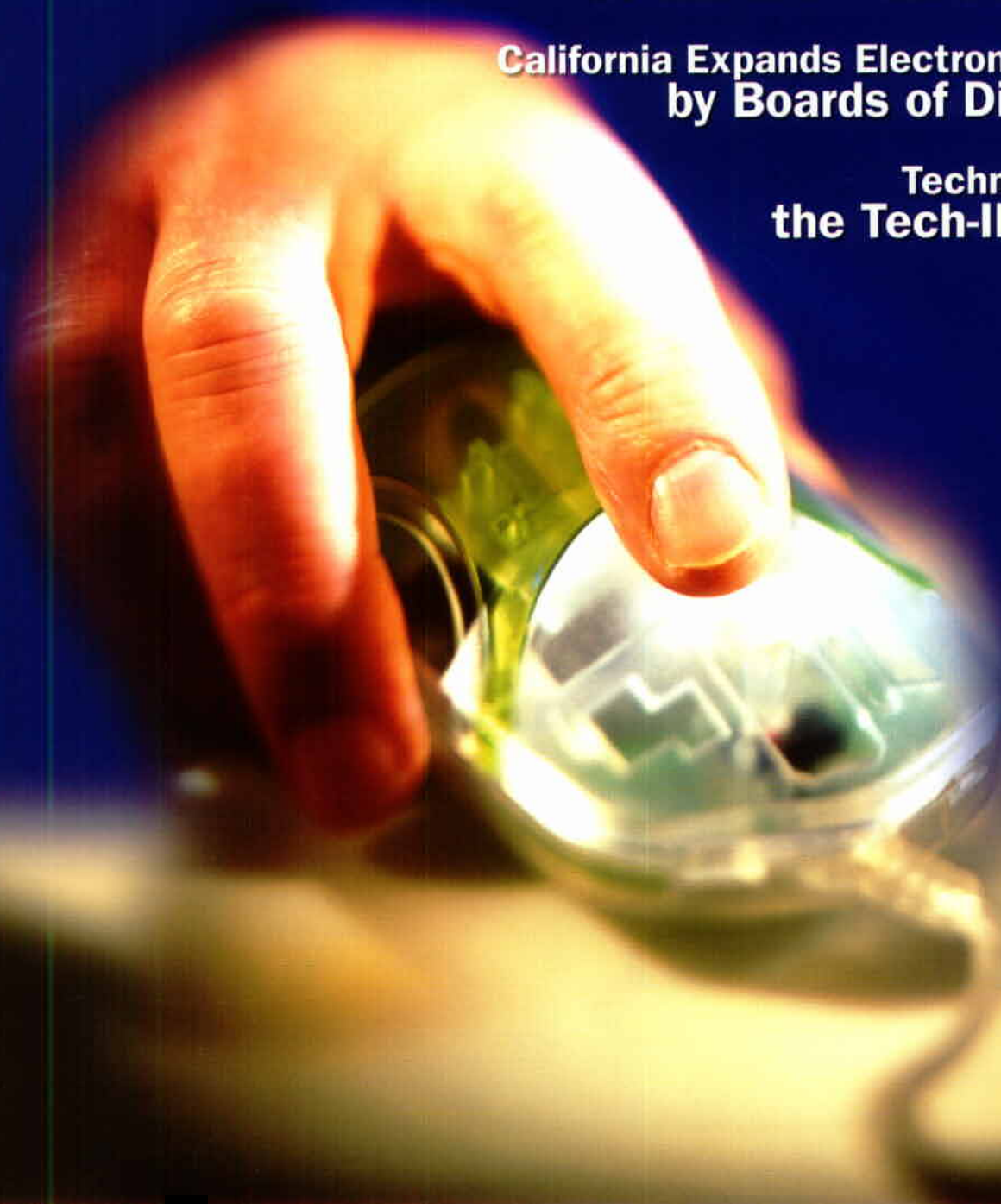
A PUBLICATION OF THE CALIFORNIA SOCIETY OF ASSOCIATION EXECUTIVES

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BY PATRICIA A. HUDSON, MPSSc, CAE  
AND JAMES R. HUDSON, PH.D.

## STRATEGIC GOVERNANCE PART III: THE POWER OF PLACE

# How Working With a Good Facilitator Will Create an Environment for Consensus and Creativity



Steve Swafford, Leadership Outfitters  
James S. Delizia, CAE of Delizia Consulting Services

Every planning process has its day...or better yet, its day and a half. The planning retreat is the one opportunity that you have to gain insight, support, direction and focus from volunteer leaders and staff professionals. Up until now, the articles in this series have examined the conceptual benefits of embracing a planning process. Now attention should focus on the planning event itself. We sought counsel from two fellow CalSAE members—James S. Delizia, CAE of DeLizia Consulting Services, and Steve Swafford of Leadership Outfitters, Inc. who dedicate a great deal of time as planning facilitators, to suggest how to make your event productive and worthwhile. We asked them to focus on six key issues. Their responses confirm that preparing for a retreat is a bit different from planning for any other type of meeting.

Another danger is the assumption that “more is better.” Achieving the expectations at the retreat will become more problematic as the size of the planning group increases. Good planning requires time for participants to think about what the direction the organization should go based on member need. Managing larger groups is possible, it just requires the time to allow for everyone to absorb, understand, and contribute.

Another assumption is that the retreat will generate a strong consensus on a clear direction, a set of goals, and priorities for the organization. Many executives are hoping that the session will help staff better understand what members expect. Reality is that the amount of time dedicated for planning does not always allow for the level of detail required to achieve such a goal. In addition to the size of the planning group, its make-up is important. The planning group should be made up of those in the decision-making role (usually the board of directors) whose ownership and accountability for the results is essential. To plan effectively, the board must have input and information that reflects.

(1) providing guidance on the time allotment needed to achieve desired outcomes; (2) engaging the planning group in advance of the session to capture their perspective and establish clear expectations for the focus/outcomes of the retreat; (3) making sure the space configuration of the planning room aligns with the planning process steps; and (4) compiling appropriate information and converting it into reference materials to ensure productive discussion.

**SS** It’s also important—if possible—to identify whether there is a “big stinky elephant issue” that members may be uncomfortable sharing openly. We believe it is important to dedicate time prior to the event to survey those attending as well as those not attending to identify potential blind spots. One-to-one conversations with key leaders and staff help identify issues that influence the organization’s culture and operations. In addition, we are interested in finding out if the group has had similar events and determine the factors that made them effective or ineffective.

### PLANNING FOR THE MEETING

**THE EXECUTIVE** What issues do  
essentials

**ID** I focus on at least four key areas:

**THE EXECUTIVE** When conducting  
planning retreat

**SS** The meeting room is often given the least amount of attention yet plays a significant psychological impact on participants’ productivity and creativity.

**THE EXECUTIVE** What issues do  
essentials

**SS** Some hope the retreat will be the “silver bullet” that will resolve their organizational problems. What I try to convey to them is that many of these problems didn’t evolve in one day and they won’t be resolved in one day either.

Those groups that try to conduct the session at their offices find greater difficulty in getting members to focus on the task; many get distracted with their own unique business or professional needs. That's because planning in a familiar environment tends to make it more difficult to look at challenges or opportunities in a new way; and produces the familiar or status quo.

**JD:** Groups sometimes ask for support very close to the date scheduled. This limits the opportunity to gather information and prepare a reference document that informs, orients, and guides members on the issues of the profession/industry/personal interest as reported by members. Two additional issues also arise that relate to the process after the event is over. The first is to determine what the scope, format and content of the planning document, so that it can be used effectively as a management tool by the Board, committees and staff. Secondly and more importantly is the discussion about plan implementation, and what structure and process will be used to ensure focus on goals and priorities identified, and monitor and measure results.

**THE EXECUTIVE:** What are some cost-effective ways to create a memorable planning event on a limited budget?

**JD:** Remember that a large part of the success is helping the leadership group build a strong bond. That is best done by including a bit of down time and giving members a chance to get to know each other in a relaxed environment. Also, consider incorporating some exercises in the planning process that are interactive, fun and can stimulate participant creativity and stretch their strategic thinking muscles, loosening them up for good discussion.

**SS:** If resources are limited consider swapping space with another association that has good meeting space (find via CalSAE). Or, consider other non-profit sites (i.e. zoo, bowling center, museum, libraries, etc.) that might fit a retreat theme. Another option might be to piggyback the meeting location with another association event or negotiate with a facility that you are using for a major event to return later in the year for a smaller one...at the same/similar favorable rates. Some properties will be more

amenable to offer discounts or amenities if they know you plan to conduct additional business.

#### POST PLANNING EXPECTATIONS

**THE EXECUTIVE:** What do you recommend the executive should do after the retreat is over to reinforce the information gained during the day?

**SS:** They should integrate any decisions into the association's culture and have ongoing conversations with members. One way to make the plan an integral and ongoing conversation is to list the key issue, objective and strategy numbers next to agenda items for board and committee meetings.

**JD:** I encourage associations to distribute a draft of the plan to the planning group for review and comment. Once those comments are considered, the plan should be presented for board review and formal approval. Once the plan has been approved, it should be communicated to members, stressing ways members can get involved in plan goals and priorities. Many of these same members will have participated up front in providing input

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Perfecting the Event Experience

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into the plan. You'll find that more members will become engaged in the plan if they are asked to participate in it some way. Consider also including important issues from the plan on the board agenda to allow greater opportunity for board discussion and deliberation, and necessary decisions that need to be made by leaders at that level. And finally, ensure plan priorities are translated into committee and staff charges; and have them develop work plans and performance goals.

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**ID:** Where do I start? Executives should feel confident that the facilitator understands the scope and desired outcomes of the retreat; look for someone who asks a great deal of questions and offers a number of options to help you achieve your goals. A good facilitator will design and document a process that not only will help identify the members who should participate but also achieve

desired outcomes. The process will also define clarity of roles for those involved in the planning process, discuss how the reference document will be generated, and explore simple ways to create an environment that will support creativity and consensus. During the process, the executive should expect the facilitator to check in routinely on progress and make adjustments as needed; manage the group dynamics, and be true to the process. And afterwards, the facilitator will not only generate the document but also provide guidance or support on plan implementation.

☛ A good facilitator takes an active interest in the association by engaging in the level of research needed to achieve the desired goals. During the session, the facilitator should be checking in routinely with the executive to secure feedback. And, finally the executive should follow-up with a courtesy call and periodic contacts to assess progress.

#### SUMMARY

A large part of the planning process is the success of the planning event. Our experienced facilitators have outlined some of the key steps that will contribute toward that end. What becomes clear very quickly is that these events should not be conducted in isolation but be preceded by the compilation of good information generated through print, personal and electronic contact. That data must be transformed into carefully worded and well-formatted documents sent prior to and referred to during the event. A process should be developed that meets the needs of the group and its unique characteristics. Great care should be given to the meeting room, group dynamics, and opportunity for participants to socialize as a means of creating a stronger leadership team. And finally, steps need to be taken to share the draft with the planning group and others; incorporate additional comments and seek board approval before creating charges for committee review and implementation. Our thanks to Jim and Steve for sharing their insight and guidance.

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