



MPI | 2016 CHAPTER BUSINESS SUMMIT
APRIL 7-9 • PLANO MARRIOTT AT LEGACY TOWN CENTER

Retreat Strategies

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Tara Liaschenko, CMM



- **Personal**
 - Wife of 20 Years
 - Baxter
 - Kickboxing
 - Reading
 - Travel

Holly Dotson

Chapter Business Manager



- **Personal**
 - Mother of 5 (3 Children, 2 Step Children)
 - Grandmother of 5
 - Fat Cat named Sushi
 - Travel
 - Hiking

Objectives

- Retreat Strategy
- Creative Format & Design
- Strategic Content

Retreat Strategy



Doers vs. Directors



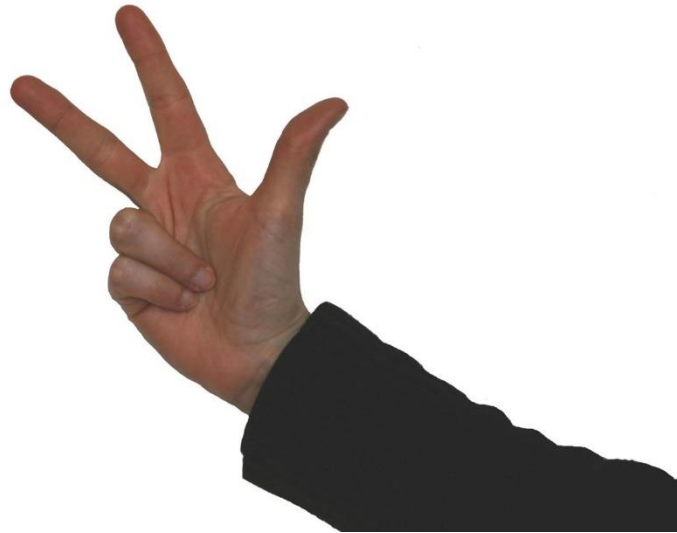
Office of the President



Attendance - Mandatory



Strategic Retreat Outcomes



Facilitator vs. CBM

Your Partner

- Chapter Management
- Execution of Business Plan & Budget
- Healthy Financial Performance
- Brand Integrity
- Identify Talent/Succession Planning
- Resource & Link to Other Chapters
- Focus on Sustainable Solutions
- Support Your Success
- CBM is not a Facilitator



Facilitator vs. CBM



- Role
 - Unbiased Designer & Conductor of Retreat Content and Emotion
 - Timely
 - Fun
 - Moderator
 - Long Term Resource for Information & Guidance

Facilitator Program



- Training Program
- Facilitator Pool
- Work with CBM

Choosing a Facilitator

- Based on Current Needs
- Interview
- Facilitator Personality & Strengths
- CBM's Recommendations
- 1 Full Year (1-3 years)
- No Obligation
- Due Diligence



Choosing a Facilitator

- Interview ?'s
 - Are they knowledgeable about MPI?
 - Fee Range & Payment Schedule (consider quality for pay)
 - Do they have a contract?



Facilitator Acquisition & Communication

- Annual
 - Secure - November of P-E Year
 - Finalize Agreement – February of P-E Year
 - Conduct Facilitator Calls March of P-E Year



Facilitator Acquisition & Communication

- Mid-Year
 - Secure - July of President Year
 - Conduct Facilitator Calls
September-October

Creative Format & Design



A Board Meeting Doesn't Have to be a “Bored Meeting”

- Describe a Typical Board Retreat Setting?



A Board Meeting Doesn't Have to be a “Bored Meeting”

- Creative Use of Space – Think About the Unexpected
 - A Place to Eat
 - A Place to Meet
 - A Place to Work
 - A Place to Play



Facilitated Team-Building

- Tie Back to Goals and Business Plan
- Address Board Dynamics and those Areas of Improvement



Small Details Can Have a BIG Impact

- Casual Clothing for Comfort and Idea-Making
- Music



Meeting Design

- Soft Furniture, no Board Room Table
- Check Your Tech
- Location – Non Traditional vs. Traditional
 - Condo Living Room
 - Pool Cabana's
 - Hotel Lobby
 - Picnic on the Lawn
- Designate a Work Area
- Extended Break Time
- Walking with Designated Topics



Musical Chairs



Strategic Content



Building the Agenda

It's all about the flow!



Presentation Model

- Pre-work
- Accountability
- Productivity



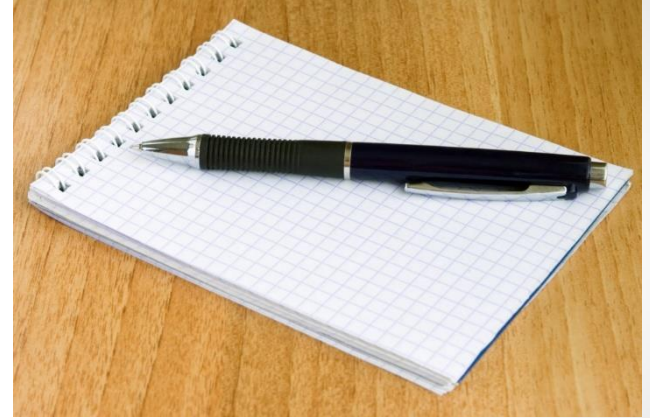
Presentation Model



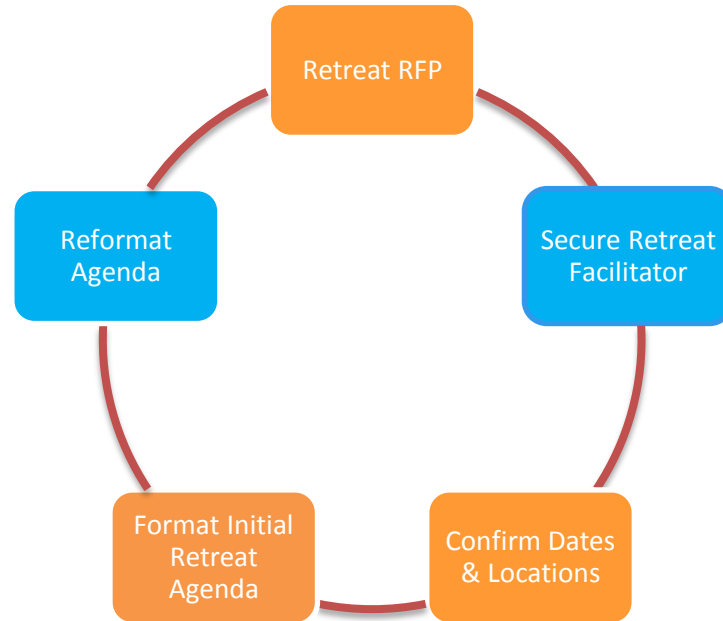
- Weeks in Advanced
- Transition Meetings
- Complete & Submit Slides & Budget
- Goals and Budget Entered into Templates
- Team Presentations

Retreat Content Checklist

- Presentation Model
- Business Plan
- 18 Month Calendar
- Budget
- Succession & Transition
- Teambuilding
- Leadership Training
- Nominations



Retreat Process



Annual & Mid-Year

- Business Plan
- Budget
- 18 Month Calendar
- Teambuilding
- Succession Planning
- Global Update



Annual

- 2 Days
- Data Reports Analysis
- Demographic Reports Analysis
- Membership Strategic Plan
- Volunteer Assessment & Plan – Org Chart Updates
- Chapter Needs Assessment Review
- Chapter Satisfaction Survey

Mid-Year

- One and a Half Days
- Review of all Plans Created at Annual
- Leadership Training
- Transition Training

Retreat Ideas

- Joint Retreats
- Teambuilding
- Physical Activity
- Org Chart Exercise

Construct & Design Your Retreat



Q & A



What was your most insightful takeaway?



THANK YOU.

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