

THE POWER OF  
**YOU**



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

# Retreat Strategies

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Holly Dotson, CMP

# 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



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# 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



Oopsey Daisy

# Strategic Content



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# Building the Agenda

## It's all about the flow!



# Presentation Model

- Pre-work
- Accountability
- Productivity



# Presentation Model



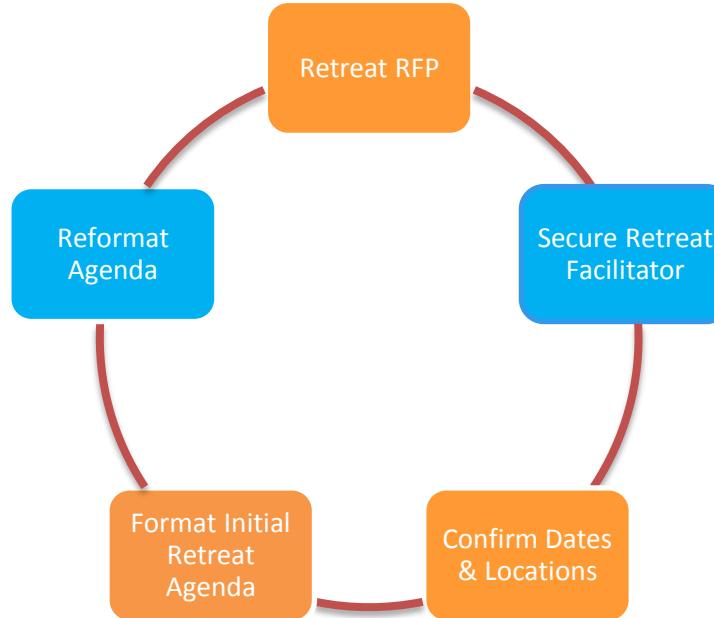
- Weeks in Advanced
- Transition Meetings
- Complete & Submit Slides & Budget
- Goals and Budget Entered into Templates
- Team Presentations

# Retreat Content Checklist

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

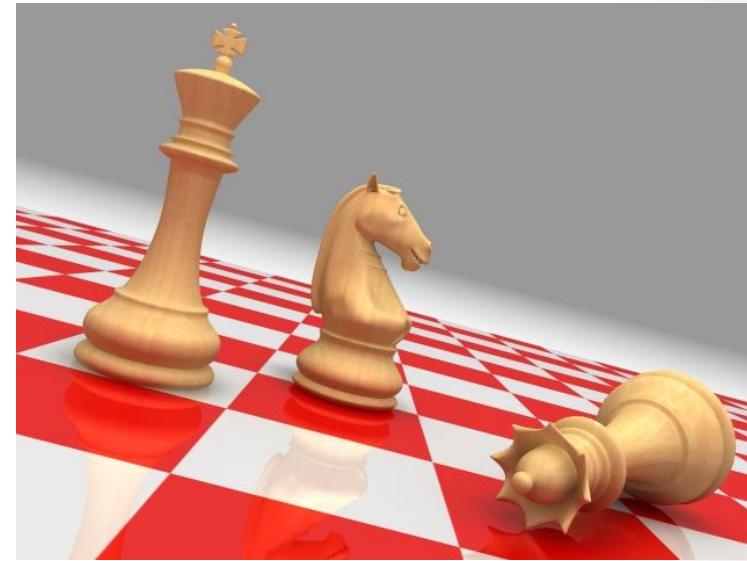


# Retreat Process



# 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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