

# Board Retreat/Strategic Planning for a National Professional Association

## SITUATION

A newly formed national professional association's was holding its inaugural board retreat. The "hard" objective of the retreat was to define a high-level strategic roadmap for the association's first year. The second "soft" objective was to build the working relationship between board members.

## SOLUTION

H+A designed and facilitated a two-and-a-half day retreat and designed a series of exercises in three areas:

- Team building activities
- A historical scan focused on the association's genesis, evolution, and work to date
- Strategic planning in the following areas:
  - *Program offerings and success metrics*
  - *Membership/sponsorship recruitment*
  - *Member to member activities*
  - *Fundraising and resource development*
  - *Strategic alliances*
  - *Communication*

## RESULTS

Project outcomes included:

- An outline of the association products and offerings
- A communications strategy for the first year
- A membership recruitment and retention plan
- A fundraising strategy
- Identification of potential alliances and a plan for enlisting them
- An understanding of staffing needs
- Establishment of working relationships among board members and agreement on the strategic areas they each would lead going forward