



Planning Retreats that Add Value

The Pitfalls of the Planning Retreat

It is common to encounter three common pitfalls in holding planning retreats:

Blue Sky Bias: A common complaint about planning retreats is that “nothing gets done” because most or all of the time is spent on long-term vision, mission statements, and broad goals. At the end of such retreats, participants often feel that little of practical value was accomplished.

Tyranny of the Urgent: Paradoxically, another complaint is that retreats spend too much time on short-term issues with no consideration for future direction. While it may feel good to have solved some sticky current problems, participants are left with a nagging feeling that the opportunity to thoughtfully discuss the future was squandered.

Focus Out of Focus: The most damning complaint about retreats is that they had no clear purpose or agenda. Often this is not because an agenda has not been set for the retreat. Rather, the problem is that outcomes for the meeting have not been clearly defined and the meeting leader is not skilled in managing a lengthy agenda. In such retreats, participants have the satisfaction of exchanging ideas with their partners – and little else.

Adding Value

We recommend that every organization hold some form of an annual planning retreat that includes the Board and executive management staff. In some organizations, it can be beneficial for other stakeholders to participate. By observing the following rules, you can maximize the value received from a planning retreat.

Rule #1: Identify the intended outcomes for the retreat before setting the agenda.

Often whole retreats are planned and agendas set with little or no consideration for the retreat’s objectives. Before creating an agenda for the retreat, create a list of the concrete outcomes that you want to accomplish. Here are some examples to select from:

- To establish the top-five action priorities for the next year.
- To review and revise the mission statement.
- To establish recruitment targets for the next three years.
- To establish objectives for the next year and assign responsibilities for each one.
- To have the opportunity for your team/staff/department to get to know each other better and discuss individual aspirations for the organization/practice.
- To make a decision on whether or not to buy a new piece of equipment.



- To review and understand what the organization/practice has accomplished over the last year.
- To reach agreement on strengths and weaknesses.
- To review and understand how the local, regional, and national health care environment is likely to change over the next three years.

Once two or three retreat outcomes have been defined, you are in a much better position to design a meeting that will accomplish definitive outcomes.

Rule #2: Review accomplishments on priorities and objectives established at the last planning retreat.

By reviewing has been accomplished since the last retreat, you will strengthen the accountability for follow-up in this retreat. Depending on the intended outcomes for the retreat, this information may be a short agenda item or a major topic for discussion. In some cases, a written report distributed before the meeting will suffice. **Warning:** Avoid lengthy post mortems aimed at assigning blame or justifying poor results. The intent is to simply report what has and has not been accomplished as background for moving forward.

Rule #3: Allow retreat time for both Blue Sky discussions and short-term action planning.

Regardless of the intended outcomes for the retreat, it is important to make sure there is an appropriate balance between Blue Sky thinking and short-term action planning. If the major focus of the retreat is to create long-term goals, it is still important to be clear about immediate action priorities for implementing those goals (See Rule #4). Likewise, if the retreat is to be focused on immediate problem-solving, it is very useful to revisit your long-term goals and vision as background for this discussion.

Rule #4: Allow time for collegial interaction.

In the press of accomplishing important retreat objectives, it is easy to give short shrift to the value of person-to-person interaction. Even though participants may not want to admit it, such interaction is vitally important to the success of the retreat. With some care in how discussions are structured and breaks/meals are scheduled, it is possible to allow for collegial interaction even in the tightest of agendas.

Rule #5: Make sure that meeting leadership is up to the task.

Good retreat leadership requires a skillful blend of facilitation, control, and group process. To put this bluntly, if your regular business meetings are rambling and unfocused, you are likely to have a rambling and unfocused planning retreat. Many groups seek outside assistance in designing and leading a planning retreat to ensure that the retreat time is well spent.



Rule #6: By the end of the retreat, identify next action steps and who is accountable for follow-through.

When this rule is ignored, participants often feel like they have had “nice conversations but nothing was accomplished.” This dilutes the value of the retreat and reduces any enthusiasm for future retreats. Make sure that the last segment of the retreat is focused on deciding:

- Short-term priorities.
- What the next action steps are.
- When these step are to be completed.
- Who is accountable for each step?
- To whom do they report their action?

Keeping this simple and very specific is important if the retreat is to end with a sense of accomplishment and forward motion. Planning retreats that succeed in clearly defining WHO – WHAT – WHEN for key priorities are much more likely to be successful in adding real, actual value to the organization/practice.