**Strategic Meeting Planning: Case Example**

**-- DRAFT --**

**Case Background and Guidance**

* Your Vice President has tapped you to be part of a small group that will plan an important program retreat involving key internal staff and external partners.
* The overall theme of the meeting is “Building on past success and planning for next steps”
* Your first charge is to advise the VP on the appropriate goals and priorities for the meeting.
* The VP has encouraged you to be responsive to staff input, where appropriate. Her only ask is that you set aside an hour of the meeting time for participants to take stock of the program’s progress over the past year and celebrate the collaborative efforts that led to those successes.
* Those likely to attend the meeting were asked to share their input in response to several questions. Their responses were collected and key themes are summarized on the other side of this sheet.

**Your Task**

Over the next 20 minutes:

* Review the case below
* Take a few minutes to read (by yourself) the input on the other side of this page. Jot down your any thoughts or ideas related to the discussion questions that you may have
* Take the remaining time to discuss them as a group and to come to consensus on goals and priorities

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| **Case Discussion Questions:**   1. What topics do you recommend as priorities for inclusion at the strategic meeting and which ones would you suggest deferring for another time? 2. Why? |

**Summary of Team Input for the Meeting**

Q1. *What’s working/going well right now—key assets?*

* Partners are passionate about the program’s mission and work
* Many staff at partner organizations respect what their colleagues bring to the program’s work
* A recent win has also lifted the spirits of staff at partner organizations
* The program has a good reputation among community leaders where it is active
* Past beneficiaries of the program have proven to be highly effective champions

Q2. *What is getting in the way of team progress on the work—key challenges?*

* Communication issues—some partners feel out of the loop or blindsided by program decisions; several note that they are unclear who has decision making power.
* Results from a recent survey of program beneficiaries—though largely positive—have identified some unexpected concerns with possible program implications
* Partners haven’t had time to discuss the status of a growth opportunity or decide on next steps
* Administrative issues are causing errors in purchasing and billing processes, as well as confusion about the chain of responsibilities among program partners
* Partners seem to have widely differing views on how the program should be funded
* Recent leadership turnover in one partner organization has raised concerns among others about commitment to the program
* Limited follow up after previous strategic meetings has disappointed several partners

Q3. *What would meaningful progress look like coming out of the meeting?*

* A chance to celebrate team successes
* All participants get to discuss their vision for the program and be heard
* Hearing more about work that partners are doing, even if not directly related to this program
* Consensus on whether to further explore the new program opportunity
* Stay on topic and finish on time
* Better communication and sense of priorities going forward
* A chance for everyone to speak their minds honestly
* Clear next steps for follow up
* Having time to connect and get to know each other better, without feeling rushed.

Q4*. What longer-term goals or changes (3-6 months) would you like to see after the meeting?*

* Improved communication among partner organizations—keeping each other in the loop
* Greater clarity on the roles of partner organizations and fit with the programs strategy
* Better sense of what is expected of me and how I am supposed to deal with people who don’t seem as “on board” with what we are trying to do.