

Retreat Facilitation and Strategic Planning

DFA partners with organization leaders to design and facilitate work so the retreat/ strategic planning/visioning is fully collaborative. Each piece of the retreat builds on previous work where that is critical. A deliberately supportive context for dialogue, teambuilding, renewal, and action planning, as retreat needs dictate is created.

A Typical Model:

- We complete “Appreciative Inquiry” interviews of key leaders and co-create a design for retreat/planning process.** Diane or an associate may begin coaching and serving as a mirror to the organization’s leaders. They are supported in asking new questions of the organization.

Objectives: Clarity about organizational initiatives and leadership issues; identification of individual needs, mental models and resistance.
- Key stakeholders brought together for one to three days. (Can be broken into 1/2 day sessions).** Key environmental forces impinging on the organization identified and opportunities to move the organization forward acknowledged.

Objectives: Tight use of “time away” to clarify the context of change and sense of goals for all stakeholders. Describes current reality at the level of events and articulates the operating (tacit) Vision in the current reality.
- Participants may use visioning tools to do a series of structured tasks to clarify past successes and build upon these to envision the future.** In communication or *dialogue*, they openly share discoveries and possibilities.

Objectives: Alignment of personal visions and values with organizational vision and mission.
- Participants evaluate the desired future state for feasibility and obstacles, building on previous consensus.** They integrate problem-solving techniques with the visioning. Members publicly commit to an action plan to implement a part of the desired future.

Objectives: Gaps or challenges identified at each level; organizational configurations designed to achieve mission and assure that plans effectively meet environmental challenges

APPLICATIONS FOR SHARED VISIONING IN CHANGING BUSINESS TIMES:

- Strategic Planning
- Need for Organizational "Renewal"
- New Leader or Team Members
- Mergers
- Market Opportunities & Threats
- Workplace and Cultural Diversity Initiatives
- Groups or Teams in Crisis
- Downsizing
- Any group experiencing the need to team, for cross-functioning, high performance, self-management.