

## Board Relationship Building Activities

**Intro:** What I heard A say is that X's growth is strongly dependent on building relationships. The purpose of today's activities is to help you figure out how you can contribute to X's growth through realizing and leveraging relationships and connections that you already have.

### Activity 1: Relationship Brainstorming

First, I am going to ask you think about the vastness of your personal networks - both loose connections and strong connections. Next we will explore them more closely, but first – pure brainstorming. **HANDOUT PLACEMAT.** Think about the different connections you have in your life ... then fill out this chart that identifies PEOPLE (NAMES) you have connections to in as many categories as you can.

- **You will *not* need to share your placemat**
- **Names can go under more than one category**
- **Take 15 minutes**
- **Placemat categories:**
  - Civic Clubs (Rotary, Lions, etc.)
  - Special Interest (Gardening, Community Theatre, Political, etc.)
  - People you play sports with (tennis, golf, etc.)
  - Social (Country Club, Women's Club, etc.)
  - Alumni Associations (college, retirees, etc.)
  - Individuals who are famous
  - Professional Organizations (Chamber of Commerce, Professional Field)
  - Faith Based-Affiliations (church, synagogue, Men's group, etc.)
  - Informal Groups (Book Clubs, Monday trivia nights, etc.)
  - Neighborhood (home-owners association, block club, etc.)
  - Friends/Neighbors/Family with special talents, skills, weird hobbies
  - Volunteering (scouts, PTA, Red Cross, etc.)
  - Groups that your kids are involved with (sports, booster clubs, etc.)
  - Business owners/decision makers
  - Businesses you use regularly (restaurant, doctor, lawn service, hairdresser, etc.)
  - Individuals who are avid travelers
  - Friends/Neighbors/Family who lead/decision makers in other groups
  - Individuals who have a passion for reading
  - Individuals who are/were Educators
  - Individuals who are immigrants or work with immigrants
  - Political connections
  - Media/public relations connections
  - Philanthropic Donors
  - Other: \_\_\_\_\_

### Follow-up questions (And feel free to add to your placemat as we talk!):

- There are 24 categories
  - Did anyone have names under all 24?
  - How many of you have names under more than 12 categories? (16? 20?)
- Is there anything surprising that you found when you completed the map?
  - Is your map bigger or smaller than you thought?
  - Are some categories more obvious than others? Fuller/sparser?
- Did you feel categories were missing?
  - SHARE: what category did you add (if any)?
- SHARE examples as you are comfortable – GO AROUND ROOM

## Activity #2: Relationship Needs

**PREP: Flipchart headings.** Divide the larger group into four groups Each group will have a flip chart pad. On the top each group will have a different topic related to RELATIONSHIPS NEEDED in general. (This can be kind of person, affiliation of person, board initiated, staff managed, geographically constrained, etc.): What relationships are needed...?

1. to help the X increase its **individual donor base**
2. to help the X create connections with **businesses** for
  - fundraising/sponsorships
  - and the employer initiative
3. to help the X increase its **Y base**
4. to increase the **Z base**
  - in low/moderate census tracts or
  - provide for greater diversity of ...

**Each group will discuss and write down ideas on their topic for 15 minutes. Then groups will rotate to next flipchart for 5 minutes. Rotate 3<sup>rd</sup> time for 1 min. Original group reports out.**

### Follow-up questions for group:

- Discuss each flipchart's contents; highlight for emphasis
- What do you feel are the **most important** relationships/connections that are listed?
- Are there some common **themes** across the groups?
- What do **you think it will take** for us (COLLECTIVELY) to create these relationships? (This includes X staff... A to comment?! Segue...)

## Activity #3: Connecting and Committing

Now think back to your placemat. Think about X's needs. Which connections are you willing to use to help create relationships (now)? People LIKE to be asked to belong, to join, to contribute!! (#1 reason people don't give to a cause/organization is because they aren't asked!

**PREP: FLIPCHART with chart for them to use: WHO | WHY | SUPPORT**

Take out a piece of paper and spend a few minutes - write down 3-5 personal commitments:

- WHO will you connect with?
- WHY will you connect (what purpose/reason/specific X need)?
- And what SUPPORT do you need (from X staff or from other board members)?

All SHARE at least one example

**CONCLUDE:** Reflect for next 24 hours and add to your commitment list. Then send it to B (Board Chair). Your deadline is noon tomorrow.

## Board Offsite: Future Planning Session

**Goal:** Determine vision for X’s future 3-5 years out and create supporting strategies

8:00	<i>Arrive, networking, food</i>
8:20	<p>Review agenda, confirm goal, introductions</p> <ul style="list-style-type: none"> <li>• Restate goal – heads nodding (today is vision-focused, if mission needs to change after today, then deal with it later)</li> <li>• Restate preparation work already done (Board chair adds/agrees)</li> <li>• Introductions - names, tenure with X, if officer + XYZ bucket list</li> </ul>
8:35	<p>Current state</p> <ul style="list-style-type: none"> <li>• Business model: geography, customers, programs, funding</li> <li>• Competition</li> <li>• 5 flipcharts with headers – whole group</li> </ul>
9:00	<p>Envisioning the future</p> <ul style="list-style-type: none"> <li>• VISUALIZE 2024 (like athlete) (Close eyes. Use all senses, 360-degree view, who, what, where) What’s different about XYZ in MI in 2024? What does the very successful X look like? Write thoughts on sticky notes. 10 min. post on wall.</li> <li>• Return to current bus model flipcharts, <u>diff color</u>: Future business model: geography, customers, programs, funding, and competition</li> <li>• More sticky notes – 2 min</li> <li>• Then group all and <b>CONCLUDE</b></li> </ul>
10:00	<p>Getting to X’s successful future</p> <ul style="list-style-type: none"> <li>• What will get us to the future we desire? What’s in our way?</li> <li>• What do we need to do? <b>BRAINSTORM</b></li> <li>• And what’s most important? <b>VOTE WITH DOTS</b></li> </ul> <p>People Resources + \$\$ Resources</p> <p>Board, volunteers, members/ship, co-opetition</p>
10:45	<p>Strategy statements</p> <ul style="list-style-type: none"> <li>• Champions</li> <li>• SMART</li> </ul>
11:45-12	Wrap up and next steps

**Handouts:** Mission statement, Goal and agenda for offsite,

Sample strategic planning flow and content; topics/headings  
excerpted from strategic plan

**Logo here**

# Strategic Planning

- Current State:
  - Current business model and funding sources
  - Recent past accomplishments
  - Progress to 2019 goals
  - Trend and Competitive Analyses
  - SWOT
- Looking Ahead:
  - Vision
  - Board input
  - Future business model
- Future:
  - Keys to attaining vision
  - Big Question(s)
  - Strategies (SMART)

**B**raun & Associates

