

Getting It “On” at the Strategic Planning Retreat

Developing the concept of collaborative governance and the strategic planning process is a major thrust when searching for successful strategies in private clubs. Why?

Because, in my opinion, the only way to change the private club culture is through a slow sustained commitment to change and as we’ve discovered, in this series of BoardRoom articles, the strategic plan is the most fundamental and powerful tool to bring about that change.

To reiterate, commitment to collaborative governance means a commitment to operating the club through a strategic plan. It’s disciplining volunteer leaders to not interfere in the operation of the club instead disciplining them to set policy and give guidelines. In establishing a strategic plan, the club commits to collaborative governance, the plan and the process. A strong commitment, no doubt.

Collaborative governance, achieved through strategic planning, involves everyone in raising the bar and creating pride in what happens: volunteers, the president, the board, members, the committees and paid associates, the general manager, department heads and staff...everyone! It’s pride of outcome.

However, there must be a clear understanding of the process developed by the club’s strategic planning committee. There must be an unequivocal commitment to the process and the committee by the board, management and members, because commitment to this means developing and implementing the club’s core values, mission and vision and ensuring that the goals, strategies and actions are consistent with, and connected to them.

The club makes a commitment to the plan through club bylaws and/or rules that ensure the executive committee and president implement the sitting strategic plan. They cannot disregard it. If they don’t wish to implement the plan, they can change it, but only through the planning process. They can’t shelve it.

One of the biggest Achilles heels in private clubs is the fact that an incoming president has the power to change the existing strategic plan. You need to guard

against this, and in fact, if someone raises a question, or a rogue member wants a change, someone has to call that member’s bluff, because you need continuity.

To build that buffer, simply say: “It’s not in the club’s strategic plan.” That’s taking ownership of your club, rather than having it hijacked, after the fact.

Instituting this process is also the general manager taking ownership of the club, because you, the general manager, are the expert guiding and leading your club in creating a committee that’s transparent, inclusionary and participatory. “*This is you taking ownership of the club.*”



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Tarunism - Leadership is about ownership, ownership of the plan, the process and the outcome!

This is sustainable, and it will give the club leadership credibility, and more importantly, it eliminates the potential of micro-management of the club’s affairs by the board of directors.

So now with this commitment, your strategic planning process is a “go,” and again we stress, the process must be deliberative and iterative. Deliberation meaning the strategic planning committee does its homework, paying attention to facts and to details to help ensure success. Iteration meaning the plan is an outcome of several levels of revision. First, the strategic planning committee deliberates, develops a draft then puts it out for membership review and feedback. Once the membership’s input is incorporated, it’s presented to the board for approval. After reviewing it, the board may revise it. As slow as this is, it is the secret to getting buy-in.

Managing the club strategically warrants planning, implementing, assessing and realigning – every year, because this provides the club with continuity, consistency and connectivity, an oft-missing piece in club governance.

In addition, your club may want to use a neutral third party facilitator. This addresses two common traps or pitfalls.

First, a third party facilitator – a professional – “understands the process, strategic thinking, visioning, and understands the private club dynamic.” This person can protect the credibility of the strategic planning committee and the board, by allaying any possibility of vested interests or a predisposed agenda taking over. The loudmouths or more assertive members of the planning committee cannot hijack the process, THE agenda, or push their own hidden agenda.

Secondly is the issue of getting everyone participating, not necessarily meaning everyone has an equal say. It's imperative to demand participation (something a facilitator can do), and not simply have people accepting committee decisions, with little or no input. Passivity isn't participation, because participation in collaborative governance requires stating expressly where you stand on every issue – being transparent.

To protect the credibility of management, it's easier for a facilitator to demand participation than it is for either management or another volunteer (i.e. the committee chair). In other words as a volunteer you can't police your peers, and in most instances it's best not even to try.

When we understand how the decision is made, we understand the process, and the outcome is transparent...we know what steps have been taken to reach the decision. And to reiterate a point I've made in the past, real leadership happens when an environment is

created, in which everyone likes and wants to participate. Each person feels they are adding value to the process.

The integrity of the process is maintained through participation, inclusion and transparency leading to the sustained success of the club through collaborative governance.

Ready for the retreat

The needs assessment, stage one of the strategic planning process, establishes the initial flow of information and also sets the stage for the retreat. The needs assessment involves reviews, fact finding, analysis, trending and understanding including: a minutes review, a department by department operational review, financial trending, membership trending, bylaws review, a study of the club marketplace and membership input including focus groups and surveys.

The needs assessment should also include private interviews with members of the board, committee chairs, past presidents, and management, because these people have a vested interest and know what's happening. You're looking for trends in what people are saying and the issues they're raising. If several raise the same issue, investigate and validate that issue.

At the retreat, the first action is to build the planning committee into a cohesive team so you can build consensus for your decision-making. Rules for the retreat must be established. I recommend mandatory participation for everyone, when they're at the retreat, because you want to know where they stand, otherwise, you'll have participants walking out saying "I didn't agree." That's something you definitely don't want. Everyone has to speak and be heard in the spirit of consensus, even if they don't like the initiative, because that's what consensus is all about, "Can you live with it?"

Once the ground rules are established, everyone should create and describe their vision for the club, and their objectives for the retreat: "What do you want to accomplish. What do you want the club to become?" It's imperative everyone hear what you have to say, because even if there is redundancy, people know where you stand. It's a facilitator's ploy or trick so everyone knows where you (and everyone else) stand, and it gets everyone involved.

It's all part of the team building process with the objective being conceptual decision-making. A cohesive team means we respect the opinions of others whether we agree or not. We respect the fact other people are participating with the same

wanted a new pool whereas the older golfers saw it as a big waste of limited resources. The strategic planning committee was charged with dealing with this hot issue. As you may guess this committee too was divided.

After the market was studied, it was obvious that the club needed a new pool, just to stay competitive. So after the deliberations were exhausted and it came time to put closure, I asked if they could all live with a new pool (a million plus capital project). You guessed it the consensus was yes. While many in the group did not believe it was the best use of the member's money they could and did live with it, for good reason, I might add.

Because participation at the retreat is mandatory, it means that before any initiative, any action is taken, everyone participating has to take a stand on it. We don't want fence sitters, nor do we want people to keep their mouths shut, whether they are the silent majority or silent minority. If they don't participate, we don't know where they stand.

It's imperative to hear everyone's points of view. Before a facilitator can go around the room, saying 'can you live with it,' the facilitator has to say: 'Where do you stand?' A vital part of the facilitator's role is forcing everyone to express their opinions on every issue.

This also makes the process safe for every participant without fear of being shouted down or rejected. You cannot let

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best interests. It doesn't matter whether we feel others people's powers of reasoning aren't as good as ours; whether their experiences aren't as good; or whether their choices of strategy are as good as ours, we respect the fact others are here with rest of the club in mind, and the right they have to be heard.

As we know in the private club industry, it's not uncommon to have decisions made by majority rule (by the privileged few or behind closed doors). Whereas our objective is to build consensus, by encouraging consensus; where there are no winners or losers but where's there's strong support for decisions.

Pool or no pool

If participants are part of building consensus, they are saying, "I participated in that decision and I can live with it." At a recent club that we worked with, the swimming pool was a big bone of contention. Families with kids

anyone react to what others are saying, because everyone must be given a platform to state their opinions without fear of being beaten down by loudmouths or other objectors.

So once you've established the ground rules, a good first step at the retreat is for everyone, up front, to identify what their objectives are for this retreat. What do they want to accomplish...or take away with them from this retreat?

Upon recognizing the objectives, build consensus based upon what everyone has said...it's the first endeavor in building cohesion and trust on the strategic planning committee. **BR**

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