Resolution Ready

Free guide · Strategy

# How to run a strategy day

A practical guide for chief executives, chairs and senior teams in charities and public services who are planning a day to agree a direction, from preparing for it to leaving with a plan people own.



resolutionready.org.uk

## What the day is for

A strategy day works best when it has one job. Most set out to agree a direction for the next three to five years, the few goals that will get the organisation there, and what it will stop doing to make room. Write that job down in one sentence before anything else is planned, and test every session against it. The strategy document is written afterwards, from what the day agreed.

> **Examples of a one sentence purpose**
>
> Agree what we will focus on for the next three years as our main grant comes to an end.
>
> Decide whether to keep running the youth service ourselves or pass it to a partner.
>
> Agree the three outcomes the service will be judged on, and what we will stop doing to make room for them.

## Who should be there

Bring together the people who will own the strategy and the people who will deliver it. In a charity that usually means trustees and the senior team. In a local authority service it means the leadership team and the managers who run the service. Between eight and twenty people works well in one room. With more than that, plan for smaller groups through most of the day.

Decide in advance how you will hear from the people who cannot be there, including the people the organisation serves, staff and volunteers, and partners. Gather their views before the day so they shape it from the start.

## What a good day leaves you with

1. **A purpose for the next three to five years that everyone in the room can say back**
2. **No more than three goals**
3. **A clear list of what the organisation will stop doing, or not start**
4. **An owner and a first action for every goal**
5. **A date to look again, already in the diary**

## Before the day

1. **Agree the purpose**
   The chair and chief executive agree the one sentence purpose and who will attend.

2. **Ask staff and trustees**
   A short questionnaire to trustees, staff and volunteers shows where people agree and where they do not. Our free Staff and trustee consultation questionnaire takes ten to fifteen minutes to complete.

3. **Gather what people have already told you**
   Complaints, feedback, surveys and what the people you serve have said give an honest account of how the organisation works today.

4. **Send a few questions in advance**
   A week before, send three or four questions to everyone attending. Our free Questions to ask before a strategy day has sixteen to choose from.

5. **Choose the room**
   Book somewhere with space to move and plenty of wall space, away from the usual office if you can.

6. **Agree who will facilitate**
   A facilitator from outside the organisation lets the chief executive and chair take part fully rather than run the day.

## A planning timeline

| When | What to do |
|---|---|
| **Six weeks before** | Agree the purpose, the date and who will attend. Book the room and the facilitator. |
| **Four weeks before** | Send the staff and trustee questionnaire. Start gathering feedback, complaints themes and survey results. |
| **Two weeks before** | Close the questionnaire and summarise the results by group, so trustees, staff and volunteers can be compared. |
| **One week before** | Send the agenda, the summary of results and three or four questions to everyone attending. |
| **The day before** | Set up the room, print the results for the walls, and walk through the plan with the chair. |

## A sample agenda for a full day

The four main sessions follow Thinking Differently®, our theory of change: listen, reflect, structure, respond.

| Time | Session | What happens |
|---|---|---|
| 9.30 | Welcome | Agree the purpose of the day and how it will run. |
| 9.45 | Listen | Share the questionnaire results and what the people you serve, staff and partners have said. Everyone hears this before anyone proposes anything. |
| 11.00 | Break | |
| 11.15 | Reflect | Small groups say back what stood out and what sits underneath it, then name the two or three things that matter most. |
| 12.30 | Lunch | |
| 13.15 | Structure | Set out the possible directions, including staying as you are. Agree three goals and what you will stop doing. |
| 14.45 | Break | |
| 15.00 | Respond | Each goal gets an owner, its first actions and a date to report back. |
| 15.45 | Close | Read back what has been agreed and the date to look again. |
| 16.00 | Finish | |

## A half day version

A half day suits reviewing an existing strategy better than setting a new direction. Keep all four sessions and shorten each one.

| Time | Session | What happens |
|---|---|---|
| 9.30 | Welcome | Purpose and how the morning will run. |
| 9.40 | Listen | What has changed since the strategy was agreed, and what people have said. |
| 10.30 | Reflect | What is working, what is not, and why. |
| 11.15 | Break | |
| 11.30 | Structure | What to keep, change or stop. |
| 12.30 | Respond | Owners, actions and the date to look again. |
| 13.00 | Finish | |

## Listen

Everyone hears the same evidence before anyone puts forward a view.

> **Try this: a gallery walk**
>
> Put the questionnaire results, feedback and complaints themes on the walls. People walk round in pairs for twenty minutes and add sticky notes to anything that surprises them or that they think is missing. Then hear from each pair before any discussion starts.

### Questions to ask

What stands out for you?

What surprised you?

Whose voice is missing from the walls?

### Watch for

Difficult feedback being explained away.

The most senior person speaking first and setting the tone.

## Reflect

The room turns what it has heard into a shared account of what is going on.

> **Try this: say it back**
>
> In mixed groups of four or five, each group writes three sentences that sum up what they heard, in words the people it came from would recognise. Groups read them out, and the room agrees the two or three themes that matter most.

### Questions to ask

What sits underneath this?

What has been tried before, and what happened?

What would the people we serve say we have missed?

### Watch for

Groups moving to solutions too soon.

Groups made up only of trustees or only of staff.

## Structure

The room sets out the real choices and agrees a direction.

> **Try this: three years on**
>
> Each group describes what would be different in three years if the strategy worked, in terms the people you serve would notice. Then set out three or four options, including staying as you are, and test each one against those descriptions. Agree no more than three goals.

> **Questions to ask**
>
> What has to be decided, and by whom?
>
> What would we stop doing?
>
> What would have to be true for this to work?

> **Watch for**
>
> Options that are really the same option.
>
> A fourth goal creeping in.

## Respond

Everyone leaves with owners, dates and a way of checking progress.

> **Try this: the owners wall**
>
> Write each goal at the top of a large sheet. Underneath, list the first three actions, an owner for each and a date. Nobody leaves until every sheet is complete and has been read back to the room.

> **Questions to ask**
>
> What will we do first?
>
> Who owns this?
>
> How will we know it is working?
>
> When will we look again?

> **Watch for**
>
> Actions owned by the whole team, which in practice means nobody.
>
> Dates left open.

## Trustees and staff in the same room

Trustees and staff see the organisation from different places, and a strategy day is often the first time they have thought about the future together. Mixed groups help each hear the other. The chair takes part and protects the decisions, while the facilitator runs the process. Agree that split with the chair beforehand.

In a local authority service the same applies to the leadership team and the managers who run the service. Where elected members or a senior leadership team will need to agree the outcome, plan how it will be taken to them.

## Running it online

1. **Split the day**
   Two sessions of about two and a half hours on different days work better than a full day on screen.
2. **Use a shared whiteboard**
   An online board takes the place of the walls for the Listen and Reflect sessions.
3. **Use smaller rooms**
   Breakout rooms of four or five for Reflect and Structure, with a named person in each to report back.
4. **Send everything in advance**
   Results, agenda and questions arrive at least a week before, so the time online is spent deciding.
5. **Build in breaks**
   A short break every hour, and cameras on where people are comfortable with it.

## What gets in the way

1. **Too many goals**
   Three is enough. If a fourth is important enough, one of the three is not.
2. **The answer is chosen too early**
   When the most senior or loudest voice settles the question in the first hour, the rest of the day becomes a formality. Hold the options open until everyone has been heard.
3. **The day runs out of time**
   A day that never reaches the Respond session ends with a list of ideas and nobody responsible for any of them. Protect the afternoon.
4. **Nothing happens afterwards**
   Book the date to look again before people leave the room.

## After the day

Send a short written record within a week, setting out the purpose, the goals, what will stop, the owners and the review date. Turn it into a strategy on a page that can sit in front of every leadership meeting. Write a fuller document only if funders or trustees need one.

## Looking again at three and six months

### At three months

Which actions have happened, and which have stalled?

Is every owner still clear what they own?

### At six months

What has changed since the day?

Does any goal need to change, or anything else need to stop?

## Tools for the day

The pages that follow are for capturing what happens on the day. Print one of each for every group, or put them on the wall at poster size. Whoever is recording for a group fills in the sheet as they go, and the facilitator collects them at the end of each session. Together they become the written record that goes out within a week.

| Session | Tool | What it captures |
|---|---|---|
| **Listen** | What we heard | What people said, where it came from, and what surprised the room. |
| **Listen** | Questions to come back to | Questions that matter but do not belong in the session that raised them. |
| **Reflect** | Themes | The two or three things that matter most, and what sits underneath them. |
| **Structure** | Options | Each possible direction, tested against what would be different in three years. |
| **Respond** | Action plan | Every action with an owner, a date and a way of knowing it has happened. |
| **Close** | Record of decisions | What was agreed, read back before people leave. |

Tool for the day · Listen

## What we heard

Note what people have said, from the questionnaire, feedback, complaints and the people you serve, and anything that surprised the group.

| Where it came from | What was said | What surprised us |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |

## Questions to come back to

| Question | Raised by | When we will come back to it |
|---|---|---|
| | | |
| | | |
| | | |

Tool for the day · Reflect

## Themes

Write the three sentences your group agreed, then list the themes that matter most and what sits underneath each one.

**Our three sentences: what we heard, in words the people it came from would recognise**

| Theme | What sits underneath it | Who raised it |
|---|---|---|
| | | |
| | | |
| | | |

Tool for the day · Structure

## Options

Set out three or four options, including staying as you are, and test each one against what would be different in three years.

**If the strategy worked, in three years the people we serve would notice**

| Option | What would be different in three years | What we would stop doing | What would have to be true |
|---|---|---|---|
| Stay as we are | | | |
| | | | |
| | | | |

**Goal 1 agreed**

**Goal 2 agreed**

**Goal 3 agreed**

Tool for the day · Respond

## Action plan

One row for each action. Every action needs an owner and a date before people leave.

| Goal | Action | Owner | By when | How we will know |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Tool for the day · Close

## Record of decisions

Fill this in on the day, read it back before people leave, and send it round within a week.

**Organisation**

**Date of the day**

**The purpose of the day, in one sentence**

**Goal 1**

**Owner and first actions**

**Goal 2**

**Owner and first actions**

**Goal 3**

**Owner and first actions**

**What we will stop doing, or not start**

**Date to look again**

Resolution Ready

# Resolution Ready

Resolution Ready offers independent review, training, facilitation and improvement support to local authorities, children's trusts and charities.

We plan and facilitate strategy days, from the questionnaire beforehand to the strategy on a page afterwards. We walk alongside your leaders as they agree a direction and build a plan of their own. Each piece of work is shaped with you and costed in advance.

## Free resources that go with this guide

- Strategy on a page template
- Questions to ask before a strategy day
- Staff and trustee consultation questionnaire
- Theory of change template

## Contact

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