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Special Report

Planning Your Planning Retreat

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A planning retreat for your group offers an excellent chance for the practice to set long-range goals for the organization. The following are some suggestions and considerations to improve the preparation for any retreat.

- **Meeting Dates:** The meeting should be at a time when all physicians and the manager can attend. This may involve the group obtaining call coverage from others. Although this can be a challenge, it can be done (and has been done by many other groups).
- **Meeting Times:** For long-range planning retreats, it is likely that you will need 1 to 2 weekend days for your retreat. There are many ways such times can be arranged, but what seems to work best is an all day meeting on Saturday, and an all or partial day on Sunday. Our experience is that the group tends to work better in the mornings and loses energy in the late afternoons.
- **Retreat Locations:** We suggest the group consider a location other than the group's offices. If the retreat is held at the practice office, it is difficult to focus on the long-range, and difficult to “round-up” the physicians after a break.

Off-site locations can range from in-town hotel conference rooms, to resort areas out of town. Some groups use facilities on local college campuses, while others use conference rooms at one of the hospitals they cover. The main criteria to look for include:

- Is the location acceptable to the physicians?



- Can the location handle the meals and other logistics for the retreat? Have they had experience doing this for others?
- Is the cost reasonable?

The meeting location should allow the physicians to meet in smaller subgroups for several sections of the retreat. This is accomplished by either having breakout rooms or a large enough meeting room that the smaller groups can meet and not disturb each other.

- **Meeting Arrangements:** You should arrange the following with the meeting location:
 - Meals and Refreshments: Groups usually offer a continental breakfast, a mid-morning coffee refill, lunch, and a mid-afternoon break. If the meeting times are structured to run through dinner, it is also normally arranged.
 - Visuals: The facility should provide two or three flip chart easels with pads and markers.
 - Writing Materials: Either you or the facility should provide notepads and pens for the physicians.

As you might expect, our knowledge in this area is based on the fact that Latham Consulting Group has provided **Strategic Planning Facilitation Services** to many medical groups. If we can provide assistance or answer any questions you might have, please contact us at 704/365-8889.