



SAMPLE STRATEGY SESSION

TEMPLATE

Purpose of the strategy session:

Insert your response here:

Helpful Hints:

Consider: “What do we hope to gain from this conversation?”

Potential responses: better communication, fewer conflicts, a more informed board, the ED feeling supported, the board chair having the information they need to do their job well, etc.

Sample Purpose Statement: This strategy session aims to establish positive communication norms between the ED and board chair so that both feel respected, informed, and empowered to fulfill their role.

Deliverables

Insert your response here:

Helpful Hints

Consider: “What do we want/need to walk away with to feel the conversation was meaningful/a good use of our time?”

Potential Responses: a better understanding of our roles, availability of the ED/chair, preferred means of communication, type of communication that will be helpful, etc.

Sample Deliverables: The ED and board chair agree that meeting outcomes should include:

- a. An assessment of our current communication norms
- b. A document outlining new fundamental communication norms related but not limited to the following:
 - ✓ Content/information each leader needs from the other
 - ✓ Timelines for securing and providing information to each other
 - ✓ Methods for communicating information (email, text, team management software, social media, phone, in-person conversations, etc.)
 - ✓ Communication considerations (personality, communication style,



- ✓ Accountability measures

Focus Question

Focus Question: **Insert your response here:**

Helpful Hints:

- ✓ Strategy sessions are most successful when participants address ONE focus question.
- ✓ “Establishing communication norms” might appear to be a single topic, but clearly defining the scope helps participants avoid confusion and maximize conversation time.
- ✓ A series of “conversation prompts” are helpful ways to get the group moving towards decision-making around the focus question.

Sample Focus questions:

- What communication norms must we implement to ensure that the ED feels supported in his/her/their role?
- What communication norms must we implement to ensure the board chair feels more equipped/empowered in his/her/their role?
- What communication norms must we implement to ensure the board is more equipped to support ___ initiative?
- What must we do over the next ___ months to ensure the incoming board chair is best prepared for his/her/their new leadership role?

Conversation Prompts

Questions: Insert your response here:	Responses: Insert your response here:

SAMPLE Questions	Responses
What do we know to be true about _____?	
What do we feel are the biggest challenges to positive/productive communication?	
What do we feel we feel works well related to communication between ___ and ___?	



What is the most critical content that we need to share regularly?	
What systems might we implement to streamline communication?	

Helpful Hints:

- ✓ When addressing a focus question, it is helpful to break down conversation points that allow participants to acknowledge current realities, share their personal feelings, and make decisions that get the team closer to the goal.
- ✓ The end goal of each strategy session is to respond to the focus question and walk away with the proposed deliverables.