



PLANNING and BOARD TRAINING FACILITATION

“By failing to prepare, you are preparing to fail.” Ben Franklin

All organizations, regardless of size, location, and resources will not achieve success without a plan. After 35 years of successful economic development and chamber management in 5 states, I bring some experience in facilitation of this process called “planning” to the table.

My process consists of the following elements that ensures a successful planning and training event:

Preparation

I will review your organization’s existing plan(s), if any exist, and will review its results or lack thereof with the organization’s leadership.

I will work with the organization’s leadership to determine the desired results of a planning event and will assist in determining the date and timing of the event. I will also have some suggestions as to participants.

Room set up and positioning of participants is important in achieving positive results. I will assist with determining room set up and staging.

I will conduct an anonymous survey of participants to gather opinions on pressing issues affecting economic development and the organization.

Agenda

I will prepare an agenda for the event. There will be a component of “Board of Director’s Duties and Responsibilities”. If necessary, we will conduct a survey of participants in advance. I will also work with the organization’s leadership to determine appropriate presentations to set the stage for planning and developing goals and objectives.

Facilitation

The facilitator's job is to plan, guide and manage the group planning event to ensure that the group's objectives are met effectively, with clear thinking, good participation and full buy-in from everyone who is involved. I will fulfill the role of "the guy from more than 50 miles away with a briefcase" who can say what needs to be said without fearing repercussions from anyone in the group.

Follow Up Report

I will provide a review of the results of the discussions and evaluations taken during the day and will provide a follow-up report within a few days following the planning event.

My Fee

Very simple, my fee for the Planning Event Facilitation is \$1,200 + mileage and overnight expenses. This fee includes all materials to be used during the retreat.

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"If you don't know where you are going, you will end up someplace else."

Yogi Berra

