

STRATEGIC PLANNING FACILITATION SERVICES

INTRODUCTION

They say that many golf bets are won or lost on the first tee . . . it's what is negotiated prior to the first tee shot that will determine the outcome of the day. The same applies to successful strategic planning session outcomes!

With nearly thirty years of working in organizational management, fourteen years with local, state and national associations, and fifteen years with self-insured risk management pools, Rick Brush has been a part of many strategic planning sessions that ranged from excellent to not very productive. These experiences fueled his passion to create the "Perfect" strategic planning session and to provide this service to organizations.

He has spent his career working with groups of individuals and engaging them for the collective benefit of their group – in other words, getting board members to take off their individual hats, wear the hat of the organization, and figure out how they can best work together to plan the organization's future. His style is personal and collaborative, creating an environment that is comfortable to openly share information, debate in a constructive manner, and come to specific agreed upon goals.

THREE PARTS TO A SUCCESSFUL STRATEGIC PLANNING SESSION

BEFORE THE MEETING

Work that happens prior to the strategic planning meeting sets the stage for the day. Before the meeting, Rick will work with staff to establish a timeline to interview staff and key board members, create a survey to be sent to all participants, and make sure the table is set for a productive meeting. This is the foundation that enables the group to dive into matters swiftly and head on, so that on the day of the meeting, they will be engaged right from the start.

DURING THE MEETING

The best facilitators are simply that – facilitators of discussion. Rick does not impose his opinions into your process and deliberations, but will artfully lead discussions, recognize sticking points, know how to overcome them, and work to build consensus towards setting goals. This is the "What" phase, meaning "What" should be the organization's focus.

AFTER THE MEETING

He will work with your staff to build a report that is clear and concise, creating a useful document to implement the "How" phase. The report will document Strategic Goals, Outcomes, and Milestones. It will be used by staff to establish priorities, build timelines, identify responsible parties, and determine any necessary additional resources.



CSAC
EXCESS
INSURANCE
AUTHORITY



FACILITATOR BIO

Rick Brush is the Chief Member Services Officer for the CSAC Excess Insurance Authority (EIA), one of the largest self-insurance pools in the nation with approximately 2,000 public agency members. Rick is responsible for strategic initiatives for both the EIA and its captive insurance company, the Excess Insurance Organization. He is an integral part of the Senior Management team and is responsible for the delivery of professional and reliable risk management services to EIA members. In addition, he helps to identify and create future program enhancements.

Previously, Rick worked at Bickmore, a risk management consulting firm, where he led the formation of five self-insurance groups (was the Administrator for one of them), and was the Administrator for a joint powers authority of twenty-one school districts.

Prior to that, Rick was the CEO of the California Society of Association Executives (CalSAE), the third largest society of association executives in the nation.

PERSPECTIVE

Having been the CEO, Administrator and staff liaison of an organization, working with many strategic planning facilitators, Rick is well aware of the needs and expectations of staff. Having been a board member of many organizations, he also knows what it is like to sit in the seat of a board member. This gives him a unique perspective and understanding of the roles of each person in the room during a strategic planning session.

SPECIALTIES

- Strategic Planning
- Board Leadership
- Board Management
- Risk Management
- Relationship Building
- Strategic Partnerships

References are available upon request.

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