



KLR Consulting

Inspiring Success in Your Leaders and Teams

Hope Services Board of Directors | success story

“Our Board is a great group of people—a lot of high-powered, smart, successful executives,” says Cameron Haste, Chair of the Hope Services Board of Directors. “Talent was definitely not the issue. In our case it was a lack of engagement and direction.”

This Board needed guidance to get them back on track, engaged, and focused on the organization’s priorities.

“Lisa, another Board member, took me aside after one of our meetings and suggested that we get an experienced facilitator in to help us. She said she knew just the right person.”

KLR Consulting Steps in, Plans Board Retreat

When Cameron met Kristi for the first time, he realized that his board member was right. “Her experience, combined with her enthusiasm and genuine desire to enhance our skills, was clear from the start.”

Kristi went to work, first meeting with each Board member to gain insight into the needs of the group. “She took the time to talk to them, find out where they stood, how they viewed the Board, and what they wanted to get out of the retreat.” Once she had this information Kristi crafted an agenda for a challenging and focused retreat, and created a framework that encouraged open discussion and clarity.

Cameron adds, “And fun. It was a working retreat, but Kristi made sure that we also had some fun.”

Board Retreat is a Board Revival

“The retreat was definitely a revival for us,” said Cameron. “We expected to do some hard work, and to hash out goals and strategies, but I don’t think we realized that we would come out of this reinvigorated and motivated to move forward.”

One of the things Cameron noted about Kristi’s facilitation is that she was quietly authoritative. “You’ve got all these strong personalities, C-level executives, and Kristi handled them beautifully. She just didn’t let anyone get away with anything. She was kind, but firm and she got all of us to participate fully.”

Hope Services Board

Industry: Nonprofit

Challenges:

- Clarity of goals & direction.
- Understand roles & responsibilities.
- Governance & expectations.
- Board members not engaged

KLR Solutions:

- Facilitate Board retreat.
- Facilitate Strategic Planning process.
- Develop clear framework for focused results.
- Authoritative yet flexible facilitation.
- Ongoing follow up/ continuing development.

Benefits of KLR Programs:

- Defined roles, assigned responsibilities.
- Goals & long-term vision identified.
- Plans drafted, both strategic and individual.
- Expectations defined, governance/operations mapped, board members aligned.
- Board members inspired and motivated to move forward on collective goals.
- Greater collaboration.



Hope Services Board Success Story

Clarity, Enthusiasm & Solid, Actionable Results

The retreat resulted in renewed engagement and enthusiasm for the Board, as well as very specific action items. “We ended up with clarity in our strategic focus, defined roles, assigned responsibilities, and a better sense of how to accomplish our goals.”

Kristi helped the Board to define their committee structure and to align their governance, including a written set of governance guidelines.

Follow-up Retreats

With so much identified to work on in the first retreat, the Board realized that it would be wise to hold additional, shorter retreats to follow up. “We needed to make sure that all this good work didn’t just get put in a drawer,” says Cameron, “So we scheduled two more retreats and had Kristi act as our accountability partner. She is keeping us on track to meet our goals and ensuring we follow our plan.”

Another Board member, a partner at Sidley law firm in Palo Alto, was so impressed with Kristi’s ability to hold executives accountable and get things done that she brought Kristi into Sidley to facilitate a strategic planning partner retreat.

Cameron concludes, “I have recommended Kristi to other people, other Boards. She is a skilled facilitator, adept at improving relationships and engagement, and has an ability to cut through the BS and get right to the issues.”

“The retreat was definitely a revival for us. We expected to do some hard work, and to hash out goals and strategies, but we didn't expect to come out of this reinvigorated, inspired, and excited to move forward.”

~ Cameron Haste, Board Chair,
Hope Services Board of Directors

***To learn more about KLR Consulting, visit our website
www.klrconsulting.com***