

How to Have a Successful Board Retreat

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Three Parts to Success:

1. Pre-retreat
2. Retreat
3. Post-retreat

Pre-retreat

- Why do it?

- ☆ To build your Team
- ☆ To build momentum - *create clear directions and energy*
- ☆ To focus on and address clearly defined goal(s) – strategic priorities:
 - *Things that never get addressed during the year*
 - *Strategic planning and goals*
 - *Self-assessment and Board development*
 - *Review of the fundamentals: values, mission, vision*
 - *Education on timely/field relevant subjects*
 - *Relationship-building*

- Why not do it?

Pre-retreat

- How to “sell” it to the Board/Staff and gain their full commitment?
 - ☆ Use euphemisms for “Retreat” (*if need be*)
 - ☆ Be creative (ReTreat; RetrEat)
 - ☆ Provide/show value and purpose
 - ☆ Find 2-4 respected supporters (*e.g. Board Chair; E.D.*)
 - ☆ Don't try to sell it – *ask for input; thus involve the whole Board*
 - ☆ Use good old trick of “keeping up with the Joneses” 😊
 - ☆ Use mentoring authority; knowledge of best practices

Pre-retreat

- Planning

- ✧ Retreat Planning Committee – 3-5 people (board, staff, facilitator)
- ✧ **Purpose** – limit to 1-2 strategic topics/goals - (drives other decisions)
- ✧ Budget
- ✧ Calendar (2-4 months) & attendance promotion mechanism (100-80%)
- ✧ Invitation list
- ✧ Facilitator (outsider: objectivity and expertise) and speakers
- ✧ Time (1-2 days) & location (to suit the goals, accessible, but “far from the office”)
- ✧ Research & materials (Stakeholders’ further input, buy-in and commitment)
- ✧ Agenda (realistic, focused, relevant & fun) and set-up
- ✧ Management of the participants’ expectations – Board Chair & E.D.
- ✧ Retreat follow-up
- ✧ Full participation (RSVP; follow-ups; no late arrivals/early departures)

Retreat

- ✧ Food and social time
- ✧ Break the ice
- ✧ Agreement (*objectives, agenda, outcomes; ground rules; roles*)
- ✧ Facilitation and retreat format – *trust & safety*
- ✧ Retreat work – *varies based on the objective of the retreat*
- ✧ Breaks
- ✧ Humor
- ✧ Conclusions & Accomplishments (*energy, momentum, next steps; end on a high note*)

Post-retreat

- Follow-up:

- ✧ Capture and distribute the notes
- ✧ Create action plans and evaluate
- ✧ Vote at the Board meeting
- ✧ Post-retreat survey (*quality, quantity, next year*)
- ✧ Share the retreat highlights with the constituency
- ✧ Clear follow-up process for next steps (*who, when*)

Don't

- ✧ plan a retreat without full commitment of volunteer and professional leadership
- ✧ hold it without agreeing on the realistic objectives solicited from a diverse group
- ✧ schedule a rigid, over-planned and inflexible agenda
- ✧ choose a site that is too close to home/office
- ✧ give participants too much pre-retreat homework
- ✧ follow your “Board room” format (make sure to involve the facilitator early on in the process)
- ✧ forget to use humor and have fun

Case Studies

- What are the pitfalls/personalities/circumstances to watch out for?
- What works?
- What doesn't work?