

Planning a Board Retreat

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A well-planned, inclusively conceived, effectively executed retreat is perhaps the best way to address head-on some of the more challenging issues facing a board and the organization it governs. Because a board retreat is an unparalleled opportunity for progress, perhaps a better term for the kind of focused, action-oriented meeting that is advocated would be forward retreat, or strategic meeting.

Like anything worth doing, a forward retreat doesn't just happen. It requires careful planning and a significant commitment of resources, time, and creative energy - by planners, by the organization's staff, and by participants. The forward retreat approach can rarely be accomplished within the quintessential retreat format in which planners don't consult members in setting meeting objectives, the schedule is often inflexible, and activities are usually generic.

Participants in such retreats recognize that their input is not really desired and find that the meeting's results have little impact on the real work of the organization or board. Unfortunately, nonprofit board members who have endured poorly planned or implemented retreats may come to expect that all retreats are at best exercises in futility and at worst a waste of time and resources. Recently, retreat planning has been injected with fresh energy and creativity. Organizers do their best to engage and keep the attention of participants with hands-on activities, team-building games, small-group discussions, and opportunities for exploration. A forward retreat goes one step further- tying the meeting's agenda and activities clearly to the organization's strategic challenges and goals.

Boards that regularly engage in forward retreats know that the time spent away from the press of daily responsibilities and tasks can allow the board to challenge assumptions and rethink systems, begin a strategic planning process, tackle difficult issues, forge camaraderie, and improve productivity. In fact, the effectiveness of such meetings is causing many boards to reengineer their regular meeting schedules and formats to mirror the qualities of a forward retreat, which:

QUALITIES OF A SUCCESSFUL BOARD RETREAT

- **Sets Realistic Objectives** – It is important to allow time to address a few issues in depth rather than trying to cover too many topics in a short time; set achievable retreat goals; use the retreat to develop initiatives and plans that can actually be implemented.

- **Address Meaningful Topics** - avoid routine business or trivia that can better be dispatched at regular board meetings, through committees, or by staff.
- **Engages the participation and input of all board members** - may even include people from the organization's key internal and external constituencies if they have a stake in the issues being addressed at the retreat.
- **Tailors activities** to the specific culture and structure of the board and organization.
- **Flexible** in format and allows extra time for participants to explore ideas that arise unexpectedly during the retreat.
- **Enjoyable** for everyone involved, providing plenty of opportunities for participants to socialize and strengthen their relationships with one another.

A successful retreat can hinge on the work of a hard-working planning committee, a skilled facilitator, dynamic speakers, and an executive who carries out preparation down to the last detail. It can be helped along by an agreeable locale and energizing activities. However, the most important factor contributing to the success of a retreat is a planning process that involves board members.

Board retreats are special meetings organized around an issue too significant to be handled properly within a normal meeting agenda, or just as an opportunity for the Board to communicate in a setting other than a board room.

Reasons for hosting a Board Retreat:

1. Strengthen relationships and focus on future challenges.
2. Conduct a board self-assessment
3. Orient new board members
4. Refresh board members' understanding of their responsibilities
5. Strengthen board relationships and team-building
6. Prepare for strategic planning and refocusing on the mission and vision
7. Work out a critical issue (e.g., a merger or a major division among board members)

Every organization is different — and no organization stays the same from year to year. So instead of providing you with “model retreat agendas” that can be applied to any organization, we recommend a retreat planning process that can be adapted to your organization’s specific needs and resources. **To learn more about this and for more information and great resources on planning a Board Retreat visit BoardSource:**

To Go Forward, Retreat (Sandra Hughes): http://www.boardsource.org/dl.asp?document_id=520