



## WHY HAVE A RETREAT?

**Sometimes board members need to step outside of the board room to get a better look at the bigger picture.**

A retreat offers the opportunity to delve more deeply into strategic issues that there may not always be time to address during regular board meetings.

No matter what its specific objectives, a board retreat can yield a broad range of benefits. It can be

- an opportunity for planning and team building that regular board activities won't allow
- a chance to refocus on fundamentals and to reflect on mission, vision, and strategic goals
- a vehicle for strengthening trust and relationships among board members, between board and staff, or for pulling together a divided board on a critical issue

### PURPOSES

- Education
- Training
- Reflection
- Planning
- Socializing

### TYPES OF RETREATS

- Board orientation
- Strategic planning
- Fundraising workshop
- Board self-assessment
- Discussion of major internal or strategic issues

# BOARD RETREAT

## How-to

### WHAT TOPICS SHOULD WE ADDRESS?

#### 1) Strategic planning

Because a retreat takes the board away from day-to-day tasks, it is a great opportunity to address long-range issues such as

- reviewing and revising your organization's mission statement and vision for the future. This can include considering changes in the organization's structure such as mergers or strategic alliances.
- reviewing recent achievements, assessing organizational and environmental changes, and approving future initiatives

#### 2) Education on timely subjects

As organizations approach new challenges, it's helpful to take time out to bring the board up to speed on new developments in the field or on topics of particular interest.

#### 3) Board Self-Assessment & Action Planning Session

Framing a retreat around a board self-assessment is a great way to focus the board on its own development, and BoardSource can help with that. [The Board Self-Assessment & Action Planning Session](#) pairs organizations with a BoardSource consultant to facilitate a conversation in your boardroom about the results of your self-assessment and next steps for board development.

The retreat facilitator will engage the board in an honest and productive conversation that focuses on

- ways in which the board is excelling and how to build on those strengths
- areas for growth or development, including sensitive issues that may have been surfaced as a part of the self-assessment
- areas of board performance where there may be divergent views of how the board is performing
- opportunities to clarify expectations and opportunities for enhanced performance
- prioritizing next steps for board development

#### 4) Relationship building

A retreat should include activities designed to build relationships among board members. A board that is not working effectively may consider devoting an entire retreat to relationship building with a skilled facilitator through team-building activities. Key objectives for such a retreat may include

- identifying barriers to collaboration
- building bridges to improve communication, trust, and cohesiveness
- strengthening the board–staff relationship
- improving relations between the board and staff or helping the board better understand the concerns of the organization's members or community served

# BOARD RETREAT

## How-to

### WHERE SHOULD WE HOST OUR RETREAT?

A retreat should be held in an environment conducive to accomplishing the goals you set for it—but it is very important to be far enough away from traditional meeting places to keep participants focused on the work at hand and eliminate the temptation to go back to the office.

- **If possible, the retreat should not take place in an office setting.**  
A different environment helps send the message that new ideas and innovation are in order and creativity is desirable.
- **Provide an opportunity for board members to see and interact with your organization’s mission.**  
Visit a program site or place your board members in the shoes of the community served. Developing a stronger connection to your organization’s mission can reinvigorate the board and stimulate new ideas.
- **The retreat location should provide opportunities for recreation as well as work.**  
Even if relationship building isn’t a major agenda item, it should be an auxiliary benefit of a board retreat.
- **Think about the purpose of your retreat. Do you need special equipment or facilities?**  
Ensure you have the right tools to complete the tasks scheduled at the retreat. Some retreat sites may be able to provide additional materials, if necessary.
- **Set ground rules early on about the use of technology (e.g. no cell phones in the meeting area).**  
Facilitators can be helpful in setting and enforcing these rules.
- **Think about budget.**  
Is your potential retreat location cost-effective? Will the organization incur any additional costs that could be mitigated at a different location? Be budget conscious, but also keep your goals in mind. Don’t sacrifice your retreat needs for price.

### ALTERNATIVE MEETING SPACES:

- Hiking tour
- Music festival
- Campgrounds/lodges at parks
- Historical sites
- Sporting events
- University conference centers
- Donated space from a for-profit organization
- Rental homes in a desirable location (mountains, country, beach, etc.)
- Other relevant sites that tie the mission of the organization to the board

# BOARD RETREAT

## How-to

### WHEN SHOULD WE HOST OUR RETREAT?

In selecting a retreat date, ask board members and other participants for input. Schedule your retreat well ahead of time to allow board members to put it in their calendars.

#### How long should the retreat last?

Retreats can last from several hours to several days, often taking place over a weekend. One-and-a-half to two days is about the time needed for a focused, in-depth board retreat. An overnight stay presents opportunities for informal socialization and relationship building that can't be orchestrated in the context of formal meetings and discussions.

### WHO SHOULD BE INVOLVED IN OUR RETREAT?

#### Facilitation

Every retreat needs a facilitator — someone who can help the board plan and conduct the retreats. A facilitator should not be expected to participate in the retreat as a working attendee, nor should the facilitator have any stake in the proceedings except to ensure that participants are fully engaged in activities.

The two essential requirements for an effective retreat facilitator are objectivity and expertise. A facilitator not only has to be neutral during the retreat, but also must understand how participants think, make decisions, and handle conflict in order to help them achieve consensus.

#### Organization Invitees

- Chief executive – The chief executive is often the only staff member present at board self-assessment retreats.
- Senior managers and professional staff – Everyone whose input is essential to further the discussion and enhance the retreat objectives should be invited to a retreat. For example, staff frequently participate in strategic-planning retreats.
- Spouses and guests – The decision to invite spouses sometimes can be a source of controversy in the retreat-planning process. If the retreat goals and objectives involve relationship building, the presence of spouses can set a more informal tone. The business side of a retreat, however, should not be open to family and friends.
- Honorary and emeritus board members – Usually, retreats are intended for the “working board.” However, if honorary or emeritus board members remain involved in board activities, the retreat planning committee can consider inviting them to attend.

**Your goal should be 100 percent participation** – attending a retreat is as important as attending a regular board meeting. Discourage board members from arriving late or leaving early; ask an organizational leader to reach out if key individuals do not RSVP or do not plan to attend.

# BOARD RETREAT

## How-to

### PRE-RETREAT INFORMATION

The retreat is not the time or place for lengthy informational reports. Sometimes not much pre-retreat information is necessary, but board members should be well informed about the issues to be addressed at the retreat before they arrive. Some items to consider include

- advance data gathering to assist in designing retreat goals, objectives, and agenda
- articles and background material that can inspire thinking and new approaches to your issues.

Before the meeting, all participants should receive a package including the meeting agenda and reading materials. Usually, the executive staff, in accordance with the direction of the retreat-planning committee, will handle information dissemination.

### SOME PRE-RETREAT INFORMATION DEPENDS ON THE TYPE OF RETREAT YOUR ORGANIZATION IS HOLDING.

#### **Strategic planning retreat**

Information provided should offer perspective on trends and factors that could impact the organization's ability to achieve its mission now and in the future.

- Financial trends, economic development, competition, legislative or regulatory trends
- Consider including organizational key performance indicators as well such as finances, service volume, program growth, human resources, etc.

#### **Board development and leadership retreats**

Consider disseminating confidential pre-retreat questionnaires or interviews focusing on issues that board members may be reluctant to discuss openly

- Board-staff relationship, role of the board chair

# BOARD RETREAT

## How-to

### TIPS FOR YOUR RETREAT

#### What to do

- **Use icebreaker activities to help your retreat participants relax and get more comfortable with one another.** Choose your activity based on the culture and style of the board and your goals for the retreat – schedule a social event or group exercise before each formal session.
- **Get to work.** Create the agenda for your retreat based on your goals. The retreat should include content specifically tailored to meet the objectives set by the board.
- **Take frequent breaks.** Your retreat agenda should allow time for members to talk informally and relax. Take breaks during a retreat for snacks, beverages, and to encourage participants to stand up and move around.
- **Close the meeting on a high note.** The board chair usually has the last word, thanking the board for its participation and reaffirming his or her initial commitment to the retreat process. Even if the goal was not to develop a list of specific actions, the facilitator, chair, or general manager should take a moment at the end to summarize what has been accomplished.
- **Follow up after the retreat.** Send out a post-retreat evaluation to assess results and assist in planning the next retreat. Distribute any documents developed at the retreat (mission statement, strategic planning, etc.) along with when the board will vote on adoption.

#### What not to do

- **Overschedule for fear participants will get bored.** Allowing opportunity for discussion and participation is more important.
- **Arrange the seating in theatre or classroom style.** These arrangements discourage participation and open discussion and make it easier for individuals to stop paying attention. Consider a circle, u-shape, rounds, or angling long tables towards a central isle.
- **Vote or make official decisions.** As a general rule, retreats are designed to encourage full participation and creative thinking, not to make binding decisions about the organization. Voting should be left for the subsequent regular board meeting.
- **Plan a retreat without the full commitment of board and executive leadership.** Without the commitment of leadership, it will be difficult to get full attendance and board members will not be as engaged in activities.
- **Fail to establish realistic, meaningful objectives.** Clear objectives are important for increasing the board's willingness to commit to future retreats and for assessing the effectiveness of the retreat. Additionally, don't base retreat objectives on the opinions or ideas of one person or a small group of board leaders.
- **Wait until the last minute to get the facilitator involved.** The more a facilitator knows about your board, the more effectively he or she can help you achieve your retreat objectives. Facilitators can also help ensure the retreat schedule does not adhere to a traditional meeting style or normal business presentations.