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Boards Advance through Effective Retreats

By Janet Boguch

“We don’t have time, money or resources to go on a board retreat.” “We really don’t need to have an offsite meeting.”

I have heard comments like these often over the years. However, there is evidence that neglecting off-site retreats can impede high performance and can slow progress towards mission based goals. Boards and staff benefit greatly from well planned and facilitated off-site retreats, sometimes called Board Forwards or Board Advances.

It is understandable why some folks roll their eyes at the thought of attending an off-site retreat. If they are not planned well, they can be a waste of valuable time and a wasted opportunity.

Why Retreats are Valuable

What is a retreat? Typically it is a special meeting that is designed and organized specifically to facilitate stepping back from day-to-day demands for an extended period for discussion, dialogue, and strategic thinking about an organization’s future or about a specific issue.

Setting time away from your organization, away from your electronic devices, away from day-to-day life, and away from standard board meetings helps trustees and senior staff step back and reflect, learn and go deeper on important mission based and governance related issues. Reflection is an important part of learning and adapting; retreats provide an environment for both to occur.

Effective governance concerns itself with do or die issues central to institutional success relative to mission.

Board business meetings can deal with such concerns in bite size conversations on a regular basis. Retreat planning and participation allows these important discussions to go deeper.

Retreats allow for space to have generative conversations as opposed to reviewing reports or policy matters. Most importantly, retreats provide time for board members to be more strategic versus tactical.

There are many reasons to hold retreats.

We know from research and experience that high performing groups and teams result from specific factors and situations; and we know how important it is to boost board engagement and performance in order to ensure nonprofit mission delivery.

Off-site retreats, held on an annual basis, provide a format for board members to build trust, have more time to discuss important matters, and to re-commit to one another, the staff, and the organization’s mission.

Although some people consider ‘getting acquainted’ as soft activities and unimportant, research indicates that it is essential to learn more about one another in different ways—skills, styles, type, strengths, interests, background, and so forth—in order to forge stronger and trusting ties. Without trust, progress is often slow and/or impeded by group blind spots.
Having a budget for a retreat is as important as any other programmatic budget line. Investing in board volunteers who are, in fact, ‘owners’ on behalf of the community should not be overlooked.

Where to have a retreat is important to consider. Certainly, cost is an influential factor. Ideally, a retreat is conducted away from the normal workplace because of the importance of having uninterrupted discussions. Having a setting that is closer to nature, less urban or corporate contributes to a more relaxed atmosphere. Some community centers and libraries lend their spaces for no cost. Natural light and no ambient noise are helpful, too.

What are some useful content ideas for retreats?

For boards, it is helpful to have an annual gathering where the board, along with the executive director and senior staff, come together to assess the past year and to establish agreed upon board goals, which are responsive to the organization’s strategic plan or strategic goals. Board goals are different than the organizational or operational goals.

They are developed and agreed upon by the board and are used to determine what committees and/or task forces are required to achieve them. They are the driver for all board meetings. They help board members stay focused on their work.

Topics that are often centerpieces for retreats include: strategic planning; organizational growth issues and decisions; increasing the board’s engagement in fundraising, along with training, succession planning and so forth.

How is an effective, productive and worthwhile retreat planned?

It is extremely important to have ample time to prepare for a retreat and to have a ‘retreat planning team’ that includes a representation of groups who will attend. Having a board executive committee or the executive director, along with the board president and a consultant, is not a best practice to serve as the retreat planning team.

It is important to engage newer trustees, along with mid-level and senior level board member representation, so that, ultimately, the retreat agenda is owned and understood by those attending. Buy-in is essential. Having a staff liaison on the retreat planning team is essential; it is best to have the executive director as part of the team. Depending on the size of the board and organization, another staff person might be helpful.

An outside, independent facilitator is extremely helpful so that all participants can be engaged. A skilled facilitator will bring experience, expertise, and objectivity to help plan and carry out a successful session.

What drives the retreat agenda? The most important planning topic revolves around the questions, “What are the most critical issues facing our organization?” and “What will happen if we do not deal with these issues?”

Preparation meetings will include questions such as:

- What should retreat participants do to prepare for the session?
- What type of survey will be helpful to prime retreat participants in advance of the session?

Surveys are instrumental in learning if there are any areas of concern and about areas of interest by retreat participants. Anonymity will ensure honest input.

- How long should the retreat be?

The length of a retreat is driven by the goals, objectives and the intended outcomes. If a retreat begins at 8:00 a.m., then typically people lose energy and focus around 4:00 p.m. Having breaks and including social time is essential to consider while developing the agenda.
What are some Do's and Don'ts of Successful Retreats?

When I asked board members and colleagues to share some suggestions about what contributes to successful retreats, their responses validated my retreat experiences. Some of these recommendations include:

- Be sure to review and post Retreat Rules of Engagement or Ground Rules which outline agreements for interacting. (Examples include: One person speaks at a time; No side bar conversations; Turn off electronics; Aim for common and shared agreements; Be honest and candid; Use the Parking Lot for topics, questions, concerns that are not on the agenda; Encourage full participation, emphasizing that all voices and ideas have merit.
- The lay-out of the room is critical to the success of a retreat. Group dynamics are linked to the ambiance of the meeting space. Having participants grouped at tables to allow for small group discussions is helpful. Or having tables in a U shape allows for people to all see one another.
- There should be plenty of wall space to post flip chart sheets.
- Of course, having ample snacks is very helpful. Healthy and sweet treats, along with beverages—throughout the day are very much appreciated.
- Be razor clear about session objectives and intended outcomes. If discussions go “off topic” be sure to ‘park them’ on the ‘Parking Lot/Bike Rack.’
- Having an outside facilitator is extremely helpful so that everyone has equal participation.
- Include ‘ice breakers’ and creative activities to encourage getting to know one another better and for loosening up the group.
- Don’t rush; schedule breaks and social time.
- Finally, make sure there is a written Retreat Summary that is distributed and reviewed. This helps for both accountability and forward movement after the retreat.
- The retreat planning team must allot time for a debriefing.

A retreat is only as good as the work that comes as a result of the off-site session!

Mission Movers

Excellent retreats are no accident. They are carefully planned in a great deal of detail.

Retreats are an excellent vehicle to reconnect board members, not only with each other, but most importantly to the organization’s mission, which is the *raison d’être* for the board and staff leadership to convene—to be mission movers.

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