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?