



A New Take on a Good Idea: Board Retreats

When it's time to go forward, think "retreat."

BY SANDRA R. HUGHES

In most contexts, the word *retreat* suggests the act of running away from a difficult situation. But for nonprofit board members who have participated in successful retreats, the term has exactly the opposite connotation. 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 in this article 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 differs from the quintessential retreat format in that planners consult members in setting meeting objectives, the schedule is constructed to be flexible, and activities are creative and inspiring.

Participants in poorly planned or implemented 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 these kinds of 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.

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, often humorous, activities. But the most important factor contributing to the success of a retreat is a planning process that involves board members.

Why Plan a Retreat?

A forward retreat works best when it is organized to achieve clearly defined objectives. Because a retreat is a special kind of meeting, it can easily be harnessed to a specific set of tasks. The *why* of a board retreat will usually grow out of a consideration of the unique culture and current circumstances of your organization and board.

Most boards can benefit from an annual retreat even if its goal is the same each year. To get the most of a retreat, however, a board should go into the meeting with a clearly

**THE WHY
WILL GROW
OUT OF YOUR
UNIQUE CULTURE.**



defined list of objectives, not simply a desire to improve its effectiveness. After all, clear objectives provide an effective way to measure the retreat's success.

No matter what its specific objectives, a board retreat can yield a broad range of benefits. It can be a chance to do the following:

- Refocus on fundamentals, engage in thoughtful strategic planning, and reflect on mission, vision, and strategic goals.
- Strengthen trust among board members, improve relationships between board and staff, or pull together a divided board on a critical issue.
- Conduct a self-assessment of the board.
- Conduct the planning and team-building that the press of regular board activities simply won't allow.

The knowledge, spirit, and common direction that often emerge from an effective board retreat will benefit the board long after the sessions end. So, taking the time up front to engage in thoughtful retreat planning—usually two to four months is sufficient—can yield not only an enjoyable, effective retreat, but also long-term benefits for the board.

Gain Leadership Commitment.

We've all attended meetings that thinned out in the afternoon as participants crept off to check voice mail or attend to "important" tasks back at the office. As in any endeavor, top-level commitment is essential to the success of a board retreat. The board will take its cue from how the board chair, the chief executive, the officers, and more senior, respected board members approach the retreat. The best way to gain leadership commitment is to ensure that the retreat will enhance the effectiveness of the board and the organization and that

everyone's ideas and opinions are needed and valued. Top-level commitment is revealed when:

- The board chair strongly endorses the retreat and becomes involved in the planning process.
- The chair appoints a retreat planning committee.
- The retreat is planned far enough in advance to select a date when most board members will be available.
- The chief executive becomes personally involved in the planning process.
- The retreat planning committee seeks board members' input through pre-retreat interviews or questionnaires and past retreat evaluations and suggestions.
- The board allocates a sufficient budget so that the retreat's purposes aren't compromised by inadequate facilities or support.
- Board members commit the time to prepare for and attend the retreat.

Establish a Retreat Planning Committee.

Although the primary responsibility for planning board retreats falls on the board itself, members must rely extensively on the chief executive for assistance on many fronts—from engaging a facilitator to suggesting and contacting speakers to coordinating facility arrangements. The chief executive is thus often both

a member of and staff to the committee. The retreat planning committee is responsible for making substantive decisions about the retreat, leaving administrative tasks to the executive. The committee should:

- Develop and approve retreat goals.
- Develop an invitation list.
- Promote attendance.
- Suggest or approve timing and location.
- Approve the facilitator and speakers.
- Comment on pre-retreat questionnaires and the retreat agenda.
- Coordinate retreat follow-up.

Set Clear and Realistic Goals.

A board retreat is a focused, time-limited activity. At best, the board should expect to focus on one or two main issues during the retreat. According to Sue Bunting, executive director of the Foundation for Seacoast Health in Portsmouth, New Hampshire, "One of the biggest challenges with a retreat is to enter the process with realistic expectations." A retreat is not going to solve major problems, although it can be a helpful first step in charting a course through difficult waters.

Setting realistic goals often means leaving implementation planning for a later date. The board's strength is often in guiding discussions about vision and mission and providing oversight. In planning board retreats, keep in mind the unique role of the governing board.

Typical issues addressed at board retreats include:

1. Strategic Planning. Because a retreat takes the board away from day-to-day tasks, it is an outstanding opportunity to address long-range issues. For instance:

- Review and revise the organization's mission and vision for the future. This step can include con-





sidering changes in the organization's structure, such as mergers or strategic alliances.

- Review recent achievements, assess organizational and environmental changes, and approve future initiatives.

2. Education on timely subjects.

As the organization approaches new challenges, it's helpful to take time out to bring the board up to speed on new developments in the organization's field or on topics of particular interest. The board can use an educational retreat to:

- Explore the impact on the organization of a significant topic, such as fund development, changing demographics, program expansion, or legislative issues and legal challenges. Such a retreat could also be helpful to assess the need for investment in new technological resources.
- Take action related to the topic. For example, gain board commitment for a capital campaign, or have the board approve a technology plan.

3. Self-assessment and board development.

Boards have long used annual retreats to engage in regular self-assessment and to facilitate the evolution of the board. The role of an impartial facilitator is important in conducting retreats of this type. A regular annual retreat can be a time to provide ongoing leadership training to all board members and mentoring from experienced to newer members. A retreat can also be extremely useful whenever the board is at a point of transition—when senior board leaders are rotating off the board, for example, or when the board has received an infusion of young members and finds itself facing issues of communication and collaboration among different generations. A self-assessment retreat can allow a board to undertake such specific tasks as these:



- Evaluate its roles, responsibilities, relationships, structure, work processes, recruitment mechanism, and overall effectiveness—and identify opportunities for improvement.
- Examine relationships among a national board, regional boards, affiliate organizations' boards, and local chapters.
- Revise the organization's bylaws and committee structure or rethink the nature and structure of board meetings to accommodate the working styles and values of board members of different generations—and to accomplish the work of the board in an effective and efficient way.

4. Relationship-building.

According to Linda Moore, president of Community Solutions International, "The importance of the getting-to-know-one-another piece of a retreat shouldn't be underestimated. Board members need opportunities to get to know one another so they can feel comfortable working together for a common goal." Any retreat can and should include activities designed to build relationships among board members. Although the issues before the board are serious, injecting humor and other enjoyable activities into a retreat can help solidify relationships between board members. A board that is not working effectively may also consider devoting an entire retreat to relationship-building with a skilled facilitator through Outward Bound-style or (depending on the

board's style, fitness, and age) less strenuous trust-building and team-building activities. Key objectives for such a retreat may include:

- Identify barriers to collaboration.
- Build bridges to improve communication, trust, and cohesiveness.
- Strengthen the board-chief executive relationship.
- Improve relations between the board and professional staff (hospital medical staff, foundation staff, or university faculty, for example), or help the board better understand the concerns of institutional constituencies—clients, volunteers, students, members, grantees, neighbors.

A pre-retreat questionnaire is a useful tool for the retreat planning committee to discover the issues most relevant to the board at this time. Reaching out to all potential retreat participants helps to ensure that all retreat participants understand that their input is desired and valued.

Engage Each & Every Board Member.

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 re-engineer their regular meetings to mirror the qualities of a forward retreat, which:

- **Sets realistic objectives**, allowing time to address a few issues in depth rather than trying to cover too many topics in a short time.
- **Develops initiatives and plans** that can actually be implemented.
- **Addresses meaningful topics**, avoiding 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** and 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.
- **Is flexible** enough in format to allow time for participants to explore ideas that arise unexpectedly during the retreat.
- **Is enjoyable** for everyone involved, providing plenty of opportunities for participants to socialize, laugh, and strengthen their relationships with one another.

Above all, the key in retreat planning is to be as inclusive as possible. As Thomas Holland noted in an article about retreat planning, without including every board member in identifying issues to be addressed in the retreat, "a chief executive officer or board chair may be able to persuade a board to go through the motions of a retreat—but not to the degree that it would if the whole board were closely involved in the process from the beginning." ■

This article is based on the booklet, To Go Forward, Retreat! A Board Retreat Handbook, by Sandra Hughes.

Resources

- **Eadie, Douglas & Alice Kethley, "Seven Keys to a Successful Board-Staff Retreat," *Nonprofit World*, November-December 1994.
- *Holland, Thomas, *How to Build a More Effective Board*, National Center for Nonprofit Boards, Washington, DC, 32 pages, 1996.
- *Hughes, Sandra, *To Go Forward, Retreat! A Board Retreat Handbook*, National Center for Nonprofit Boards, Washington, DC, 40 pages, 1999.
- **Meeting the Challenge: An Orientation to Nonprofit Board Service* (video), Washington, DC: National Center for Nonprofit Boards, 1998. 45 minutes, plus a 20-page User's Guide.

**Muehrcke, Jill, ed., *Board Leadership & Governance, Leadership Series, Volumes I and II.*

*Slesinger, Larry H., *Self-Assessment for Nonprofit Governing Boards*, Washington, DC: National Center for Nonprofit Boards, revised 1995.

*Available by calling 800-883-6262 or visiting www.ncnb.org.

**Available from the Society's Resource Center (see page 22 of this issue or call 800-424-7367).



Dr. Sandra R. Hughes is executive advisor to the president and senior governance consultant for the National Center for Nonprofit Boards (NCNB), Suite 900, 1822 L Street, N.W., Washington, D.C. 20036. In addition to having served as a consultant and facilitator for the past eight years, she has held various management positions at the United States Rowing Association, American Bar Association, George Williams College, Levi Strauss & Company, the Levi Strauss Foundation, the University of Tennessee, and The Christian Science Monitor.

Hughes received her Bachelor of Arts degree from the University of Maryland in English and also holds a Masters degree in Counseling and a Doctorate in Administration and Organizational Behavior. She has special interests in and has presented numerous seminars and workshops and written articles on the psychology of humor; the philosophy of management and organizational behavior; fundraising and resource development; and the psychology of sport. She also facilitates and leads programs in strategic thinking and planning, board training and leadership, resource development, fundraising, sponsorship, membership services and marketing, organization culture and values, management training, change, teamwork, effective meetings, and human resource training.

Nonprofit World • Volume 17, Number 6 November/December 1999
Published by the Society for Nonprofit Organizations
6314 Odana Road, Suite 1, Madison, WI 53719 • (800) 424-7367