

# Board Retreats: The Wave of the Future

They're not just smart, they're essential.

BY CAROL WEISMAN

If professional football teams played under the conditions of many nonprofit leadership teams, the sport would be in big trouble. Imagine a team trying to present a unified game plan, execute last-minute strategy changes, and pass the ball to score—all with virtually no practice.

Fortunately, a growing number of nonprofit boards have discovered a secret weapon—the board retreat. They've found that a group of individual players can become an effective team by gathering for an intense one-day strategy session. The one-day board retreat is leading many charitable organizations to winning seasons.

It doesn't matter how large your board or how elegant the retreat setting. You can hold your retreat on a mountain or in your office. What does matter is that you follow these six all-important steps to a productive retreat:

## 1. Make the Consultant Decision.

First, decide whether to hire someone to lead your retreat. There are many advantages to employing a professional. Doing so removes the stress of leading the group yourself, and it lets you and everyone else participate fully in the retreat. A skilled facilitator knows how to keep everyone engaged and on track. If you can't afford to hire a consultant, however, it's better to put together your own retreat than not to hold one at all.

If you do retain a facilitator, make sure it's someone with nonprofit experience. Some facilitators tout their expertise based on corporate consulting, but the nonprofit sector requires a different approach.



THE GOAL OF AN ICE BREAKER  
IS TO BRING THE GROUP CLOSER TOGETHER,  
NOT CAUSE A RIOT!

## *Plan your retreat around a few specific goals.*

### 2. Pinpoint Your Goals.

Be sure to plan your retreat around a few specific goals. Create an agenda and a list of desired outcomes. Here are examples of goals you might choose for your retreat:

- **Help the board understand** or clarify the organization's mission.
- **Delineate the roles** of paid staff and board members.
- **Help the board take responsibility** for a particular project, such as a capital campaign.
- **Build team spirit**, and help board members become more familiar with each other and the organization's work.
- **Make a difficult decision**, such as whether to merge or affiliate with another organization.

### 3. Schedule a Time.

The next step is to find a full day in which as many board members as possible can participate. Because they're busy people, give your board members at least two to three months' notice or even longer if they need to make travel plans. Offer two or three dates, and choose the one that fits most people's schedules. Don't forget to consider the needs of the group—child care for boards with many young parents, accessible facilities for boards with disabled members.

### 4. Get Ready.

Once everyone has gathered for the retreat, the real work begins. Every retreat should begin with a review of your organization's mission. Even if the retreat's goals don't involve clarifying the mission, all board members must have a strong grasp of the mission to guide their work.

An ice-breaking session is also helpful. It's amazing how a few get-acquainted exercises can increase people's comfort level.

### 5. Tackle Your Goals.

Next, address the goals you set. An experienced facilitator can guide participants through a series of creative activities that focus on each important issue. Keep in mind that goals change so that your original goals may be superseded by more immediate concerns at the time of the retreat. A good facilitator will help the board prioritize its most pressing concerns and then address them as time permits.

### 6. Make a Plan.

Perhaps the most important (and most overlooked) step is developing an action plan. It's so easy for a board to come up with wonderful ideas and then never take action to turn those ideas into reality. Create a timeline and a list of tasks for each individual. When the board meets again, all members should be prepared to report their progress.

These six steps will turn board members into a tightly-knit action team. And that makes everyone a winner! ■

#### Resources

Brinckerhoff, Peter, "How to Choose and Work with a Consultant," *Nonprofit World*, Vol. 10, No. 2.

Eadie, Douglas C., "Putting Vision to Powerful Use in Your Organization," *Nonprofit World*, Vol. 13, No. 4.

Hughes, Sandra, "A New Take on a Good Idea: Board Retreats," *Nonprofit World*, Vol. 17, No. 6.

"The Logic of Consultants' Fees," *Nonprofit World*, Vol. 8, No. 5.

Vogt, Jean, "Demystifying the Mission Statement," *Nonprofit World*, Vol. 12, No. 1

Weisman, Carol, *Board Governance Videotape*.

These resources are available from the Society's Resource Center, [www.snpo.org](http://www.snpo.org).

*Carol Weisman is the president of Board Builders, 48 Granada Way, St. Louis, Missouri 63124, [carol@boardbuilders.com](mailto:carol@boardbuilders.com), and the author of Secrets of Successful Retreats.*

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