



# Five Golden Rules for Board-Executive Retreats

“Retreat from hell” or powerful bonding experience? These keys make all the difference.

By Doug Eadie

Retreats are a powerful way to involve board members, CEOs, and senior managers in accomplishing high-impact governing work that couldn't be done – at least not as well – in regular board meetings. You can use a retreat to update your organization's vision statement, review environmental trends, and identify strategic issues. In addition, retreats are an unparalleled way to build esprit de corps, satisfaction, commitment to new directions, and emotional bonding among participants.

But just because you assemble people in a retreat setting for a day or two doesn't mean you'll automatically realize powerful returns. Be forewarned: Retreats are high-risk affairs that can easily fall apart, doing more harm than good, if they aren't meticulously designed and conducted. The last thing you need is one of those “retreats from hell” that leaves everyone frustrated at having wasted precious time and energy.

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These five golden rules will ensure that your retreat pays off without putting your organization at risk:

## 1. Involve key board members in designing the retreat.

Create a retreat committee of three to five board members, headed by the board chair. This committee can fashion a detailed retreat plan, including:

- **specific objectives** to be achieved, such as identifying strategic issues and updating your organization's vision statement
- **structure of the retreat**, including how long it will last and who will attend

- **a blow-by-blow agenda** for the retreat.

## 2. Employ a facilitator.

A professional facilitator can make three important contributions to your retreat's success:

- **Bring experience** of what works and what doesn't.
- **Keep participants on track**, ensuring that retreat objectives are achieved in the time allotted.
- **Assist** in the follow-through process, and produce a follow-up action report.

Just imagine 25 headstrong board members and executives spending a whole day or two together discussing complex issues on which there are diverse viewpoints, and you can see why self-facilitation would be risky. Professional facilitators offer an objective view. If they're authorities in areas such as strategic planning and governance, they tend to command the respect of retreat participants, who

are willing to cede authority for the time spent together.

Retaining the right facilitator is one of your most important decisions. "Retreat from hell" horror stories are usually the result of choosing the wrong facilitator. To make this critical decision, the CEO and retreat committee should review credentials, check references, and interview candidates.

Understanding facilitators' approaches is a major part of making the right decision. For example, if you'll be updating your organization's values and vision statements, you need to understand how candidates define values and vision statements and the process they use to generate them.

### 3. Use breakout groups.

Breaking participants into smaller groups is a sure-fire way to foster active participation, promote feelings of ownership, and generate lots of ideas. A 1½-day retreat might include nine breakout groups

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— three groups meeting concurrently in three rounds. In round 1, for instance, the three groups might be: values and vision; conditions and trends; and assessment of strengths and weaknesses. The following guidelines will help ensure that breakout groups are productive and satisfying:

- **Widen board ownership** by assigning a different board member to lead each breakout group.
- **Provide training** for breakout group leaders on how to facilitate their groups.
- **After the breakout sessions, get everyone together** to share the ideas generated in the smaller groups. Be sure every member of

every breakout group participates in this reporting process. Knowing they'll help present results will focus their minds on their group's work.

### 4. Avoid making final decisions.

It's natural to want to reach consensus on such things as a vision statement or list of strategic issues at the end of the retreat. But that would be a mistake. Think about it. You and your colleagues are spending a brief time grappling with complex matters that defy easy understanding, and you don't have on hand the information needed for definitive judgments. If you try to make final decisions now, you'll soon find that the feeling of closure is an illusion.

### 5. Agree on the follow-through process at the beginning.

Build the following steps into your retreat design:

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You can see why self-facilitation would be risky.

- **Record** ideas generated in the breakout groups and the whole-group discussion.

- **Appoint** a task force of a few executive team members and several non-board volunteers. Have them meet four times over the next three months, come up with a refined list of strategic issues, and send it to the CEO and executive team.

- **Ask the executive team to refine** the list further before sending it to the board's planning committee.

- **Have the board's planning committee** hold a half-day work session, review the issues, and then recommend the list to the full board for adoption.

- **After the board adopts the list, have them begin** the process of fashioning strategic initiatives to address the issues.

Thus, loose ends are tied up, decisions are made, and action is taken – not prematurely, but through a well-thought-out process. ■

### Your Board Retreat Library

Use these *Nonprofit World* articles (available at [www.snpo.org/members](http://www.snpo.org/members)) to plan your retreat:

- **Planning: What Every Board Member Should Know** (Vol. 11, No. 3)

- **How to Choose and Work with a Consultant** (Vol. 20, No. 2)

- **The Key to Building Productive Teams** (Vol. 21, No. 4)

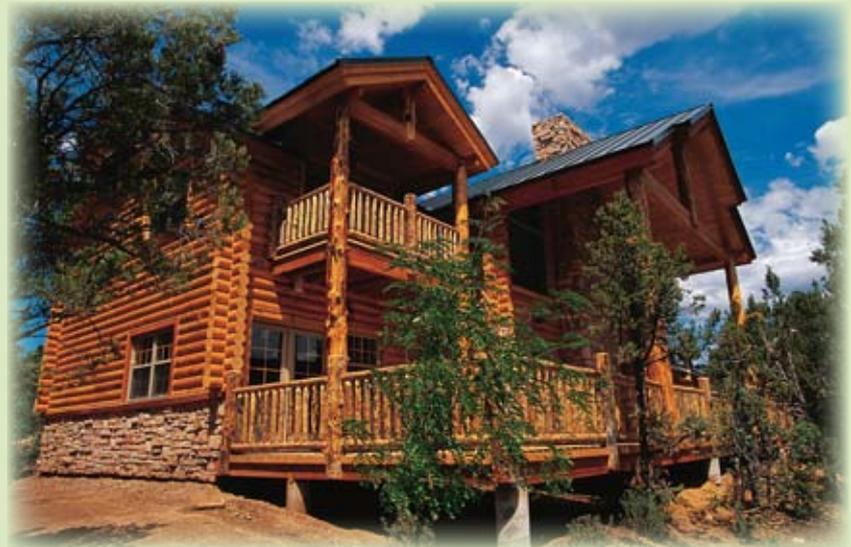
- **Master Change, Or Change Will Master You** (Vol. 14, No. 4)

- **Board Retreats: The Wave of the Future** (Vol. 22, No. 4)

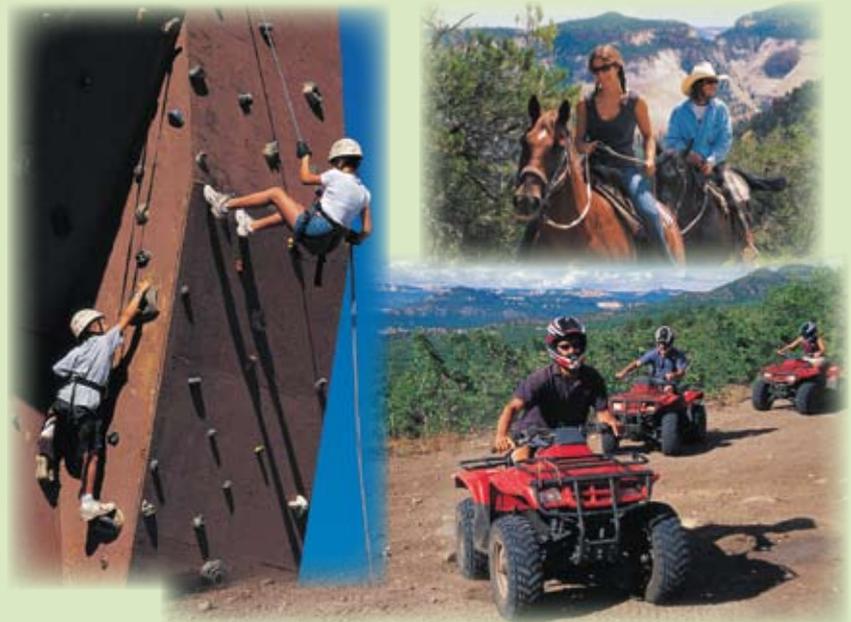
- **Training Programs Need More than Good Information** (Vol. 21, No. 2)

- **Ten Steps to Excellence: Moving Your Organization from Mission to Action** (Vol. 15, No. 2)

## Where to Retreat?



Zion Ponderosa Resort provides cabin suites, “cowboy cabins,” and tent camping.



The place you choose for your retreat can be as plain or special as you like. Some refuges, such as the Zion Ponderosa Resort in Utah's Zion National Park ([www.zionponderosa.com](http://www.zionponderosa.com)) offer high-adventure team-building, such as rock climbing, as well as more traditional team-unity exercises.

The point of a retreat is to spend time together in a different atmosphere, engage in group activities, and get everyone communicating. The important thing is that the setting be quiet and free of interruptions. Look for a location where you can remove all distractions and focus as a group on issues that will move your organization forward.

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