

Tips to Help You Prepare for Your Board Retreat

Develop a Shared Purpose. Before leaping to the retreat agenda, ask the following questions. Be sure to establish realistic, meaningful goals and objectives. Refrain from attempting too much in one day or over the course of a couple of days.

- Why should we have a retreat at this time? (Goals)
- What would board members like to see happen as a result? (Objectives)
- Do we want to focus exclusively on governance issues and responsibilities, board composition, education? Or, organizational strategy and the board's role with respect to strategic issues?
- How much play or recreation time do we need?

Determine who will be at the retreat. Sometimes boards invite staff and other key stakeholders. Sometimes it's a board member only retreat (with the executive, of course). Rather than hold to tradition or sacred cows, determine attendance based on appropriateness for the topics to be discussed. If staff (other than the executive, who always attends!) does not attend the retreat, the executive and/or board chair can always meet with them afterwards and summarize the overall discussion and major decisions.

Some boards invite other non-board constituents ó major donors, program volunteers, partners and allies, or perhaps even vendors. While they may not attend the whole retreat, these individuals can lend valuable insight and outside-the-box thinking to strategic discussions and provide the board with first-hand feedback about important issues.

Go off-site! To help liberate your board from organizational and cultural routine, hold the retreat at a different location than your normal place of work. An off-site can help everyone look at things differently and creates an environment for a more productive outcome. There are affordable options out there!

Make board self-assessment part of retreat preparation. If you are scheduling a board retreat, consider conducting a board self-assessment as a component of the retreat. It elicits input from all board members, reveals issues that can and should be discussed, and provides other helpful information about board members' anxieties or aspirations. Remember: It's risky to base retreat objectives on the opinions or ideas of one person or a small group of board leaders!

Get your facilitator involved early on. It's their job to take your proposed goals and objectives, issues and concerns, inspiration and ideas, and develop an agenda. Don't schedule a rigid, inflexible agenda before getting your facilitator's input. Let them help you break free from the "business-as-usual" format and design an effective process.

Have fun! Some board members resist team building during a retreat, thinking it's a waste of time or too "touchy-feely." However, to be an effective decision-making body, all boards need to spend some time building cohesion and getting to know each other better. A good facilitator can help you design the right kind and mix of team building for your group ó from experiential learning to enjoyable educational activities.

Collect Retreat Information and Memories. Most boards want some record of their retreat, and a tangible road map for the upcoming year. I often work with graphic recorders, who capture retreat decisions and activities through instant illustration. Other options are software programs like Mind-Mapper (check out some sample maps at www.mindmapper.com).

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