

Board retreats that work

Retreats are a great way to get your board members to spend quality time together for in-depth, strategic conversations. They can be a worthy investment in the development of your board and future of your organization. But if not properly planned, they can be expensive boondoggles that break down relationships rather than build them up.

Tap the benefits

Board retreats can allow participants to get past the mundane topics of regular board meetings and delve deeply into current or future issues. Plus, if the group usually gets together via phone conferences, a retreat facilitates building stronger working relationships.

To take advantage of those benefits and avoid wasting money, consider following several best practices. First, recognize that participant buy-in is essential. You shouldn't spring a fully planned retreat on your board without first vetting the idea and making sure everyone agrees to the merit of the session and its overarching goal. Otherwise, attendance may suffer, or worse, board members will show up but won't be fully engaged.

Logistics matter

Once the board agrees to a retreat, you can turn your thoughts to logistics, which will vary depending on the outcomes you need to achieve. A half-day in a local coffee shop may be ideal if the board needs to brainstorm creative, new fund-raising options. Broader agendas or confidential topics will require more time and privacy — perhaps several days at an offsite location.

Regardless of timeframe, getting your board members out of their normal surroundings is essential. The further you can get board members away from their regular work responsibilities, even if only mentally, the better. That also may mean banning mobile phones, pagers and other electronic devices from working sessions.

Have a plan

Every retreat needs a well-planned agenda. The best way to set the agenda is to start at the end. What outcome do you want to come away with at the close of the retreat? If, for example, you want to end the meeting with a five-year strategic plan, your agenda might start off with time to review the history of your organization and competitive research from other organizations. From there, build in time to brainstorm where your donors, beneficiaries, members and other important constituencies may be in five years.

Make sure you include adequate breaks and time for informal social interaction, such as a nice dinner. This will not only keep your board members focused, but also give them a small reward for their efforts.

Some of the most important work will happen after the retreat. That's why you need to recap all decisions and commitments, and make a plan to put your hard work into action before the board scatters. Follow up by sending the board members a written summary of retreat discussions and add action items to future board meeting agendas based on those plans. This will help ensure your retreat outcomes remain a priority even after the board goes back to "business as usual."

Thoughtful and thorough

Board retreats don't have to be fancy to be effective. As long as you approach them thoughtfully and thoroughly — achieving participant buy-in, planning adequately and following up on any decisions — they are likely to be a worthwhile investment.