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## A User's Guide to *Effective Board Retreats*

*An interruption-free environment that supports creative thinking will help directors focus on association issues.*

MOST BOARDS OF DIRECTORS ARE A VIRTUAL treasure chest of diverse talents, extensive professional experiences, and wide networking capabilities. But finding the combination that unlocks the chest's valuable contents to your association's advantage can be elusive.

Such was the case with a friend of mine, the executive director of a national association, when he sought to unleash the talents of his board. "We spent \$10,000 on a weekend retreat for our board of directors, and we have nothing to show for it, nothing at all," he lamented while describing the disastrous events at a recent retreat. He had lost control of the meeting, "arguments raged over which issues to discuss," and "two members were so upset they left early." My friend was despondent.

Unfortunately, he is not alone. His organization, like many others, had been unprepared for the session. They had not used a facilitator, there was no agreed-upon agenda, and several board members attended only parts of the retreat. The net result: virtually nothing achieved.

The keys to positive results are numerous. The first is having an important reason to hold a retreat. Another key is following specific guidelines during the event. And follow-up after the retreat is critical.

### Why a retreat?

You need to get your board away every 12-18 months to think through strategic issues that require complete discussions. Regular board meetings are too restrictive a format for this type of thinking. By getting away, I don't mean necessarily going to Aruba—though we all might like to. What I do mean is to retreat to a comfortable place where people can work without distraction.

Obviously, planning to hold the retreat at an office is not a good idea. Instead, plenty of hotels, retreat centers, colleges, and other locations are perfectly suitable for such sessions. But reasonable comfort, privacy, and lack of phones in the room are important.

Having a retreat allows the board to immerse itself in the association's issues, if only for a day or two. This increases your chances of tapping your board as the powerful asset it can be.

### Great expectations

What should you expect from a retreat? A number of tangible results are possible if you direct the agenda toward specific accomplishments, such as

- renewed understanding by the board and staff of what the organization does and why it does it;
- increased "ownership" in the business of your association by both

board and staff, generated through their participation in retreat discussions and activities;

- mutual understanding by staff and board of each other's roles and perceptions of the organization;
- specific products (mission statement, vision, strategic plan, position statement, policy); and
- a list of action points for the future.

### Guideposts for excellence

The probability of an effective session will greatly increase if you work the following factors into your retreat plans.

- **List the desired outcomes.** If you don't have an outcome as a goal, you won't have an outcome as a product. An outcome can be a plan, a mission statement, a policy, or a reaction to legislation. Have such outcomes in mind as you develop the retreat agenda.
- **Include staff in the retreat.** The number included depends on your organization. If the staff is small, you may include everyone, while a larger group may include only the senior people. A general rule is that you don't want the staff to outnumber the board members present.
- **Use a facilitator.** Don't be tempted to facilitate the meeting yourself, as my despondent friend did. You—or any staff or board member—may be

the most gifted and experienced facilitator on the planet, but your title will get in the way of effective interaction. Work with a professional facilitator, training him or her in your association's issues.

• **Break up the work sessions.** Though the board is there to think and work, don't wear people out. Give people breaks, and you will get more out of them.

• **Document the various discussions.** Ask the facilitator to write the key points on a flip chart while a scribe takes down all the details. Develop and distribute to all participants a report of the proceedings. This may be done right at the meeting, given the ease of laptop computing.

• **Stick to the issues at hand.** If you are having a retreat to discuss long-range plans, set a rule at the beginning of the retreat that you will not allow discussion of current events—such as the bill that your legislature just passed or a problem with a member organization—unless they have true long-term implications. Likewise, if your discussion is designed to help cope with a crisis, don't spend time dithering over out-year issues.

• **Encourage everyone to participate.** The worst thing that can happen at a retreat is for someone—anyone—to say nothing. Work with your facilitator to make sure that everyone is politely but firmly forced to add something to the discussion. For example, in a goal-setting session, have everyone write down a goal and then read it aloud to the group.

### Cautionary notes

Certain elements are disruptive and counterproductive to meetings. Avoid the following scenarios at all costs:

• **Writing documents, proposals, or statements as a group.** Trying to draft anything collectively is an exercise in frustration. It is far better to elicit from the group the key points that you want to cover and then designate someone else to draft a statement for editing. For example, if you are revising your mission

statement, have the group make a list of the terms or ideas that the participants want included; then designate an individual to draft a statement for consideration, editing, and improvement.

• **Allowing negative attitudes and comments to prevail.** Part of retreat culture is to brainstorm, consider new ideas, and think big. Considering new ideas is often hard for some people. However, if someone is instantly denigrating every idea, comment, or suggestion, the creative atmosphere may dissolve into a toxic one.


Some amount of negative venting can serve as a springboard for more positive ideas. A suggested response to the overly negative member might be: "I understand your frustration, and you are certainly entitled to your opinion. But let's see if we can find the positive side to this idea as well as the downside, which you have already identified."

• **Allowing people to come and go during the sessions.** One of the critical ingredients in a successful retreat is the commitment of the board members to participate in the retreat *for its entirety*. You must convince attendees to turn off their phones and beepers while they are in the meetings.

Also, you will undoubtedly receive requests from busy board members to "come only for the second day" or "leave just a few hours early." While it may sound hard-nosed, my advice is to respond politely but firmly with specific language such as this: "No, we need you there for the whole meeting. If other obligations get in the way, we understand. We'll send you the write-up of the proceedings after the retreat." It is counterproductive to force the other participants, who are there for the entire retreat, to revisit subjects to bring a tardy board member up to speed. Also, once you take a firm stand, it's surprising the number of people who were going to be late or were going to leave early who actually make it for the entire retreat.

### Postscripts

Even after the most productive session, the work of the board has only begun. Follow-up starts during the retreat:

1. Make sure the facilitator reviews the accomplishments of the retreat.
2. Have the facilitator discuss next steps. If the retreat is a policy-setting session, when and how will the drafted policies be implemented? Who is responsible for carrying this out? If the retreat was held to develop a plan, who will write up the full document? When will the participants see a follow-up action? In other words, summarize the actions or projects agreed upon at the retreat, identify the individual or committee designated to carry out each one, and attach appropriate deadlines.
3. Within 48 hours, draft and distribute to your membership a report of the retreat discussions and their outcomes. I recommend the wide distribution because members deserve to be aware of decisions and outcomes of a board retreat. The rapid distribution is recommended because the timeliness of the issues discussed will begin to wane if there is a week or two delay in getting the material out.
4. Incorporate any action items into planning and work assignments for staff and committees. Making a prompt inclusion in the ongoing activities of the association increases the likelihood that the activities will actually be accomplished.
5. Finally, at the next three or four meetings, report back to the board orally and in writing on the progress of follow-up. Remind them of the good work they did at the retreat and that it is paying off. This shows your accountability as a staff person and also encourages them to make a commitment at the time of the next retreat. If they haven't heard of accomplishments since the last retreat, they may be less inclined to make the time to come to the next one. 

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