



## ***WHY BOTHER WITH A BOARD RETREAT?***

Participation in the retreat enables board and staff members to work together in advancing the organization's mission ...

A Board Retreat, important for several reasons, often serves as the 'jumping off' point for activities in which the organization is anxious to engage but unsure of how to proceed.

The Retreat can:

- jump-start the planning process;
- provide for organizational review, change and renewal; and
- serve as the first stage in a board development process.

The retreat brings key people from the organization together in an informal, neutral setting. Participation in the retreat enables board and staff members to work together in advancing the organization's mission, keeping them involved, informed and allowing each participant to provide personal input. It is through this input that true 'buy-in' by organizational stakeholders occurs.

Some important outcomes of a Retreat include:

- building trusting relationships among board members (and board and staff);
- thoughtful reflection and purposeful decision-making;
- a focused review of some of the organization's key governance issues and elements;
- identifying organizational priorities;
- revising the mission and/or vision statements; and
- developing a board statement of roles and responsibilities.

The retreat process is comprised of these three steps:

1. Planning - A thoughtful planning meeting with staff and board leadership helps to develop a dynamic retreat agenda; the facilitator, often an

experienced outside consultant, will then be able to develop the most appropriate retreat materials.

2. Participation –The majority of board members (and key staff, as appropriate) must be able, and willing, to attend and be actively engaged in the retreat; this will yield the greatest potential to achieve desired results.
3. Post Retreat Meeting – The facilitator should prepare a report summarizing the retreat’s activities, outputs and outcomes and meet with Board and staff members to present the retreat report and discuss recommendations and next steps.

Potential agenda items for the retreat:

- Reviewing/developing mission, vision and core values statements;
- Identifying the organization’s strengths, weaknesses, opportunities and threats through use of a S.W.O.T. analysis;
- Examining and defining board and staff roles and responsibilities;
- Discussing the results of an organizational assessment;
- Conducting a board evaluation;
- Exploring organizational lifecycles; and
- Revisiting/revising/establishing organizational priorities.

Conducted in a thorough manner, the retreat serves to engage key organizational stakeholders by capturing their ideas, wisdom and enthusiasm and obtaining their “buy-in” and commitment to be actively engaged in board-appropriate activities. In turn, this will strengthen the capacity of the organization to advance its mission.

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This article is based on a presentation by Susan Lee Walling, CFRE to a seminar for Executive Directors in Phoenix, AZ