

Consultant to Nonprofits
www.marionconwayconsulting.com

Planning a Board Retreat

All nonprofit boards should have a Board Retreat at least once a year. This is the prime opportunity to discuss a matter of importance in-depth and without normal Board business that gobbles up almost all meetings.

This time of year when we look at our goals for next year is a great time to think about what you would like to do with your Board Retreat.

Getting Started

First of all ask the big picture questions. What do you hope to **accomplish** by having the retreat and what will **success** look like? The "blue" column presents two examples for very different retreats but with a few things in common:

- Detailed planning
- Retreat built on advance work
- Specific goals and definition of success
- Designed for follow-up action

Choosing the Retreat Theme

What will be the theme for your Board Retreat? Some popular

themes include:

- Board Development
 - Orientation
 - Training
 - Self-Assessment
- Strategic Planning
- Leadership
- Team Development
- Plan for Major Anniversaries
- Board/Staff Relationship

Planning the Retreat Program

The program should be designed to keep the group's interest and focus for an extended period of time. Make the most of a variety of techniques and keep them all tied to the theme of your retreat. Recommended techniques include:

- Pre-Retreat Materials
- Icebreakers
- Group Activities
- Breakout Groups
- Presentation Topics
- Facilitation

Purpose and Measure of Success for Retreats

Example #1: The retreat is for existing and prospective Board members. It will be a successful retreat if 2 invitees join the Board.

A good retreat may include:

- Highlights of recent accomplishments
- Board self-assessment feedback
- A group activity where board members describe their experience with the mission and prospective members describe what they hope it may be.
- ED presentation of goals

Example #2: The strategic planning committee will present the findings and recommendations of their work over the last nine months. The retreat will be successful if the Board adopts/ updates vision and mission statements, develops goals for the next three years, is energized, adopts strategic thinking as a way of doing business and if working committees are formed to accomplish the goals.

This retreat should include:

- Presentation of the SP Committee report
- A teamwork exercise
- Breakout groups to develop major goals
- Facilitated segments to develop mission/vision statements and prioritize the breakout group ideas

Planning Your Board Retreat with Marion Conway

Marion is an experienced facilitator of Board Retreats.

Services include:

- Retreat Program Design
- Pre-Retreat Planning
- Board Self Assessment
- Customized Retreat Feedback Questionnaire
- Suggested Follow-up Approaches for Action
- Summary of Boarded Materials in Word Document
- Retreat Facilitation
- Choice of Presentation Topics
- Strategic Planning

Planning the Retreat Program—Continued

When designing the activities keep these ideas in mind:

- Focus on your retreat goals
- Seek consensus
- Develop recommendations that will turn into action

The Retreat Leadership Team Checklist

The Board President or Board Development Chair, the Executive Director and the Retreat Facilitator usually form the core leadership team for the retreat. Responsibilities that need to be completed include:

- Select a comfortable retreat location (e.g. community center, corporate training center, spiritual retreat center, local college)
- Decide on the room layout and size requirements
- Develop detailed retreat schedule with timeframes for all segments
- Assign responsibility for each segment
- Develop presentation materials
- Develop/select group exercises
- Develop questions and assign facilitators for breakout groups
- Arrange for materials needed (e.g. flipcharts, markers, VCR).
- Develop list of action items for follow up
- Create a summary document of all the flip charts. (This is the permanent record of ideas and follow-up items.)
- Engage the board in committees and projects based on the action items

The key is to define success up front and then make sure that your program is geared toward inspiring action and results once the retreat is long over.

Resources for Planning Your Board Retreat

Books

Secrets of Successful Retreats
The Best from the Non-Profit Pros
compiled and edited by Carol Weisman

To Go Forward, Retreat!
The Board Retreat Handbook
Sandra R. Hughes
Published by Boardsource

Recommended Websites

Boardsource.org

CharityChannel.com

Managementhelp.org

Enjoy the Summer

-Marion

Workshops Offered by Marion Conway

The current workshop schedule for the remainder of 2006 include:

- Strategic Planning for Nonprofits June 19
- The Non-Profit Board – The Basics and Emerging Trends for the 21st Century (Arts orientation) September 20
- Technology Planning and Funding for Nonprofits September 26
- Technology Planning and Funding for Nonprofits October 4
- Benchmarking for Nonprofits November 5

Workshops or consulting on these subjects is also available.

- Visionary Leadership for Nonprofit Leaders
- Planning a Board Retreat
- The Search for an Executive Director

For more information, please call Marion at 973-239-8937