

## Paid Vacation?

### *12 keys for successful board retreats*

**B**oard retreats are an excellent opportunity to think about the future of the organization, establish new goals and develop desired standards of performance. As location, location, location is to real estate, preparation, preparation, preparation is the key for ensuring a successful board retreat. The following are the 12 keys to success for a board retreat:

- Solicit input from as many key internal and external stakeholders as possible, e.g., board members, executive team, key donors and community leaders. Whether it's time to explore a new strategic vision or confront evolving challenges and opportunities, it is vital to hear from your key constituents.

- In conjunction with the CEO, board chair and/or Retreat Steering Committee, develop an agenda with two to three specific goals or outcomes. It is much better to go into depth on a few issues than to spend the entire retreat on too many topics leaving little achieved or accomplished.

- Consider requiring "homework" to be completed prior to the retreat for those attending, such as reading a specific book or articles to enable a more thoughtful and educational discussion.

- Set approximate timelines for each topic to be covered and stay within them as often as possible. Though it is extremely important to encourage everyone to participate, the conversation needs to stay focused and not

wander into unproductive topics.

- Involve as many members from the senior executive team as practical, along with board members, since the executives will usually be required to implement the decided upon goals and they will feel more motivated by participating rather than from hearing about the retreat from the CEO when it is over.

- Make sure that everyone is called upon to participate. It is crucial to involve every attendee and encourage them to express their ideas and suggestions. One of the goals of the retreat is to build camaraderie and socialization.

- Select a comfortable place, preferably away from the office or where the daily workings of the organization take place. Local colleges or community organizations will often provide "free space" and area hotels have extensive experience accommodating your retreat needs.

- Allow ample breaks between key topics. People need to stand up, go to the restroom, make a call to their family, or just socialize with their colleagues. Have everyone at least stand up and stretch before the next topic.

- Build consensus on all key issues discussed and create key action steps. It is crucial to develop a set of goals for follow up on all action items. Though everyone hopefully leaves the retreat energized and motivated, it is important for a set of required actions and

responsibilities to follow for long-term success.

- Consider engaging an experienced facilitator or consultant with extensive retreat experience and competence in conducting workshops, seminars and retreats. One needs to be completely objective in facilitating the retreat to avoid conflict of interest and for making sure that all points of view are heard.

- Provide a retreat summary for all participants on key issues discussed, what consensus was developed and required action steps. This document can then be utilized at future board meetings to discuss progress or areas of obstacles encountered after the retreat. This can also be provided to those unable to attend.

- Perform a retreat customer satisfaction survey prior to leaving the room. Ask what the participants liked, disliked, which topics need further in-depth discussion and/or new topics they would like to see at the next retreat. It is also very important to know whether the location and accommodations were comfortable and enjoyable. *NPT*

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