Preparation for a Successful Board Retreat

Gayle L. Gifford, ACFRE

Author of How to Make Your Board Dramatically More Effective, Starting Today, Gayle L. Gifford, ACFRE, helps nonprofit boards and staff become more strategic in achieving their ultimate goal: to make this world a better place.

Described as “strategic, bright, insightful, fearless, and principled,” Gayle is known for challenging conventions that stop nonprofits from finding practical solutions to the problems they face.

President of the New England-based consulting firm Cause & Effect Inc., Gayle’s expertise is governance, strategic and business planning, organization and fund development, and public engagement design. Gayle is one of the 102 people who hold the advanced fundraising credential ACFRE in 2015.

Cause & Effect’s nonprofit clients have ranged from the grassroots to international, including Grassroots International, Salem Athenaeum, the House of the Seven Gables Settlement Association, Norman Bird Sanctuary, May Institute, and PLAN International.

Gayle has taught graduate courses in communications and organization development as adjunct faculty at Simmons College and Brown University. Gayle shares helpful advice and free tools on her website and blog, The Butterfly Effect, which you’ll find at www.ceffect.com. Follow her on Twitter @gaylegifford.
Preparing for a Successful Board Retreat

Why hold a retreat

- Dive deep into a topic
- Learn together
- Build the board team
- Take up an issue that doesn’t fit into typical board meeting
- Reflect and evaluate
- Establish shared vision and goals
- Renew and energize

Planning

- Annual occurrence or special occasion
- Content approved by full board & CEO
- Choose a design team that builds ownership for retreat results
- Other staff too?
- One day, half day, overnight, split
- Time of day
- Budget

Facilitation

- Who is the process guide? In-house or outside contractor
  - Neutrality
  - Skills
  - Participation
  - Honesty, fresh perspective
- Clarify consult role: facilitator, trainer, organization development consultant, content expert
- Find right match for your organization through referrals
Agenda Design

- Establish the outcomes: what is success
- Limit focus
- Accommodate different learning styles
- Create a detailed road map – print in bright color for facilitator

<table>
<thead>
<tr>
<th>What</th>
<th>How</th>
<th>Who leads</th>
<th>Start</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>Greetings, objectives; Introduce facilitator</td>
<td>Chair</td>
<td>9:00</td>
<td>10</td>
</tr>
<tr>
<td>Overview</td>
<td>Review agenda; Establish group norms; Discuss role of facilitator</td>
<td>Facilitator</td>
<td>9:10</td>
<td>10</td>
</tr>
<tr>
<td>Introductions/Icebreaker</td>
<td>Go-around; Toy exercise</td>
<td>Facilitator</td>
<td>9:20</td>
<td>15</td>
</tr>
<tr>
<td>What is on the horizon for our organization?</td>
<td>Presentation on how technology is transforming our industry; advance reading</td>
<td>Executive Director</td>
<td>9:35</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Reflective writing</td>
<td>Individuals</td>
<td>10:00</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Open discussion on presentation and advance reading</td>
<td>Facilitator</td>
<td>10:05</td>
<td>30</td>
</tr>
<tr>
<td></td>
<td>Develop list of action items for future exploration</td>
<td>Facilitator</td>
<td>10:35</td>
<td>10</td>
</tr>
<tr>
<td><strong>Morning Break</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-assessment</td>
<td>Explain objectives &amp; process, break into groups</td>
<td>Governance chair</td>
<td>11:00</td>
<td>10</td>
</tr>
<tr>
<td>Small groups, by section of assessment</td>
<td>Breakout groups</td>
<td>Breakout groups</td>
<td>11:10</td>
<td>40</td>
</tr>
<tr>
<td>Reports</td>
<td>Breakout groups</td>
<td>Breakout groups</td>
<td>11:50</td>
<td>25</td>
</tr>
<tr>
<td><strong>Lunch</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check in</td>
<td>How is it going? Reflections</td>
<td>Facilitator</td>
<td>1:00</td>
<td>5</td>
</tr>
<tr>
<td>Action Items</td>
<td>Establish action item/work plan from assessment</td>
<td>Facilitator</td>
<td>1:05</td>
<td>40</td>
</tr>
<tr>
<td>Next steps</td>
<td></td>
<td>Chair</td>
<td>1:45</td>
<td>15</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Plus/delta</td>
<td>Facilitator</td>
<td>2:00</td>
<td>10</td>
</tr>
<tr>
<td>Closing commitments</td>
<td>Drawing/go-arounds</td>
<td>Individuals</td>
<td>2:10</td>
<td>15</td>
</tr>
<tr>
<td>Thank you</td>
<td></td>
<td>Chair</td>
<td>2:25</td>
<td>5</td>
</tr>
<tr>
<td>Adjourn</td>
<td></td>
<td></td>
<td>2:30</td>
<td></td>
</tr>
</tbody>
</table>
Agenda Design (continued)

- Use simulations appropriately
- Think in segments
- Spread responsibility

Team Building

- Use introductions strategically
- Establish norms for working together
- Use icebreakers/warm ups to advance the agenda
- Create opportunities to laugh together and have fun
- Create opportunities for people to work together
- Create memorable experiences
- Be sensitive to tolerance for experiences

Location

- Inspiring place
- Room set up – tables, configuration
- Offsite, unless site is inspiring
- Windows
- Lots of blank wall space
- Room to move and room for breakouts
- Room for facilitator easels, supplies, movement
- Fresh air – access to outside
- Check out the site before you commit
- Cost
- Distances
- Parking

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Preparing for a Successful Board Retreat

Logistics
- Use a check list of supplies and materials
- Have data in room
- Blue drafting tape, non-smelly markers
- Assign responsibility
- Advance materials
- Traveling toolbox of basic equipment
- Name tags or table tents (BIG, readable at a distance first names)
- Have a back-up plan
- Arrive early, depending on set up required
- Cleanup crew
- Venue liaison, payment as needed
- ________________________________
- ________________________________
- ________________________________

Food
- Keep folks well-nourished and hydrated but not somnambulant
- Remember the tea drinkers and decafs, water
- Arrival, breaks, lunch
- Healthy & delicious
- Efficient to serve and eat
- Sufficient protein to balance the carbs and sugars
- Accommodate dietary restrictions
- Opportunity to connect
- ________________________________
- ________________________________
- ________________________________

Post Retreat
- Know who is in charge of flip charts, notes
- Compile and distribute meeting notes expeditiously
- Follow up on Basket/To Do items
- ________________________________
- ________________________________
Resources

- To Go Forward, Retreat! Sandra R. Hughes. BoardSource eBook.
- Tools for Change, Cause & Effect Inc. www.ceffect.com