

Preparing for a Successful Board Retreat



Topics:

- Purpose
- Planning
- Facilitation
- Agenda Design
- Team building
- Location
- Logistics
- Food
- Post 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

Preparing for a Successful Board Retreat



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

What	How	Who leads	Start	Time
Welcome	Greetings, objectives Introduce facilitator	Chair	9:00	10
Overview	Review agenda Establish group norms Discuss role of facilitator	Facilitator	9:10	10
Introductions/ Icebreaker	Go-around Toy exercise	Facilitator	9:20	15
What is on the horizon for our organization?	Presentation on how technology is transforming our industry; advance reading	Executive Director	9:35	25
	Reflective writing	Individuals	10:00	5
	Open discussion on presentation and advance reading	Facilitator	10:05	30
	Develop list of action items for future exploration	Facilitator	10:35	10
<i>Morning Break</i>			10:45	15
Self-assessment	Explain objectives & process, break into groups	Governance chair	11:00	10
	Small groups, by section of assessment	Breakout groups	11:10	40
	Reports	Breakout groups	11:50	25
<i>Lunch</i>			12:15	45
Check in	How is it going? Reflections	Facilitator	1:00	5
Action Items	Establish action item/work plan from assessment	Facilitator	1:05	40
Next steps		Chair	1:45	15
Evaluation	Plus/delta	Facilitator	2:00	10
Closing commitments	Drawing/go-arounds	Individuals	2:10	15
Thank you		Chair	2:25	5
Adjourn			2:30	

Preparing for a Successful Board Retreat



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
- _____
- _____
- _____
- _____

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
- _____
- _____

Preparing for a Successful Board Retreat



Resources

- *To Go Forward, Retreat!* Sandra R. Hughes. BoardSource eBook.
- *How to Make Meetings Work*. Michael Doyle and David Straus. Jove. 1982.
- *Facilitator's Guide to Participatory Decision-Making*. Sam Kaner et. al. Jossey-Bass. 2007.
- Tools for Change, Cause & Effect Inc. www.ceffect.com
- *201 Icebreakers: group mixers, energizers and playful activities*. Edie West. McGraw Hill. 1997.
- *Moving beyond Icebreakers, an interactive approach to group facilitation, learning and action*. Stanley Pollack and Mary Fusoni. Center for Teen Empowerment. 2005.
- *Making Questions Work: A Guide to How and What to Ask for Facilitators, Consultants, Managers, Coaches, and Educators*. Dorothy Strachan. Jossey-Bass. 2007.
- *The First Time Trainer*. Tom W. Goad. 1997.