

Power Retreats

Improve Outcomes at the Board Retreat

Organizations plan an annual retreat to empower the board of directors with information and inspiration. The meeting is designed to transfer information to the leadership. The schedule often includes time for recreational activities or team building.

While every retreat is well-intentioned, when volunteers are asked what they expect to gain, they reply, "I hope we get to know each other better." Their expectations are low.

When asking executives how prior retreats went, I hear, "It seemed to be a session for the leadership to come up with new projects rather than a high level discussion of how to improve our organization," said Crissy Hancock, Executive Administrative Specialist at the Midland Chamber of Commerce in Texas.

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Volunteers may view the retreat as a social function mixed with an opportunity to make suggestions. In fact they feel compelled to offer new projects. Their sentences begin with, "I have a good idea....." The result is a to-do list that creates work for the staff and officers.

Heighten Expectations

Improve the retreat by setting higher expectations. Build anticipation by announcing it as a forum for visionary leadership. Schedule time for orientation and social functions but focus the most attention on discussing the mission and goals.

Try not to let conversations fall below the level of visionary leadership. Explain that board discussions should stay above the 50,000 ft. altitude. Committee work is at 25,000-30,000 ft.; and the staff implements the decisions at the 10,000 ft. level. Anything below that can be characterized as *"in the weeds."*

The Executive Director at the Montana Society of CPAs, Jane Egan, said, "When our board really focused on our 5 goals, everything ended in alignment. From the mission, vision and value statements to the projects, committees and budget, we left our retreat with a road map that energized our staff, board members and volunteers. The outcome

of a retreat that thinks long term is rewarding for the leadership, staff and the organization."

In Bartlesville, Oklahoma, the President, of the chamber, Sheri Wilt, IOM, stated, "When we plan our retreat to focus on outcomes for the organization and community, and not just telling directors about their duties, everybody leaves motivated and with an understanding of how the current and future years should play out,"

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Tips for Successful Retreats

- Advise attendees that the desired outcome is strategic discussion and visionary leadership. Focus on the existing strategic plan --- not adding new initiatives.
- Provide information about leadership responsibilities or a board notebook.
- Find an environment that is comfortable and avoids the temptations of office or other distractions.
- Emphasize outcomes: "How can our organization improve results and fulfill its mission?"
- Schedule fun breaks and social events to offer a breather from the high-level thinking.
- Take notes. What is documented is more likely to be achieved. For good ideas that don't fit in the current program of work, move them to the "parking lot" for future consideration.

The retreat should result in an inspired team ready to govern --- not just a list of new projects.

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Note: Bob Harris, CAE, offers free governance and management tools at www.nonprofitcenter.com