

Planning a Successful Board Retreat

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A board retreat can be anticipated with dread or delight, depending on how engaging and useful it promises to be. The most common flaw in any agenda is a failure to fully address time, leading to an experience that leaves the board feeling haggard and stressed. What looks great on paper can be impossible in practice! The usual culprits are meals, breaks, transition time, and over-scheduling. When reviewing an agenda, walk yourself through each action, imagining how long each aspect will take. Be sure to buffer all this time with extra time - it's better to end earlier than run later.



Here are some tried and true aspects to consider for each:

Scheduling

- *Make the experience relevant:* Nothing makes a person feel more irrelevant than if what they experience would have been exactly the same if they weren't there, or if they are exactly the same after attending. Make sure the activities planned aren't redundant to your board's previous experiences and that they address the board's current concerns. Consider a pre-retreat survey to assess what the board seeks from their time together.
- *Value those involved:* In a retreat, group cohesion is a primary goal. It is imperative that each member walk away understanding at least one reason why each other member is an asset to the group. Prioritize brainstorming and dialog formats to provide ample opportunity for board members to learn from one another.

Breaks:

- *Check resources:* If there are 30 people and only two facilities, bathroom breaks must be longer. Is a smoking area needed? A place to make calls? Is there internet access?
- *Value recharging time:* Amazing ideas come to people during in-between moments like being in the shower. Allow for mental breaks to recharge attention. Taking this sort of time will maximize the effectiveness of the other sessions.

Transitions

- *Think geographically:* How far away is one session from another? Schedule time enough that the slowest member of your group won't be late. Anticipate and provide assistance for those who need it.

Meals:

- *If your event is catered:* What sort of set up and clean up arrangement is needed? Will you be eating in the same room you are meeting in? How will this impact your schedule?
- *If you are ordering in:* Choose a restaurant with a variety of foods and distribute the menu to the attendees ahead of time. Call the order in that morning so it is ready and delivered at the specified time. Be sure to plan for napkins, condiments, utensils, drinks, trash, and service ware.
- *If you plan to dine out:* Decide ahead of time on a location, preferably within walking distance or a short ride away. Count heads and make reservations. If this option is chosen, it should be the culmination of the event, as once attendees leave a meeting site, it is difficult for them to return to meeting mode.

A board retreat is a time for each board member to shine and build confidence in themselves and colleagues. When a board is enthusiastic about their abilities and capacity, they will utilize it! Chances are the genius of the collective group has plenty to offer, so go easy on presentations and let your board rise to the occasion!

For help planning your board retreat, or for a trained, professional facilitator for your retreat, contact **do good Consulting** at dogood@dogoodconsulting.org or 217-778-1687.

Great Energy Boosters for Retreats & Meetings

1) Plan a quick stretch in the middle of long sessions to revitalize group energy.

2) Provide non-sugar snacks like nuts, pretzels, or veggies that can be grazed on to maintain blood sugar levels (sugar gives a quick boost followed by an undesirable slump).

3) Depending on the formality of the moment, drop a non-sequitur to snag attention (e.g., the fiscal year closed in the black, we are all going to wear light-up bow-ties for the rest of the month, and the budget report is due in June.)

4) Switch formats: alternate presentations with workshops and hands-on activities.

5) Discourage boredom with engaging questions and activities that demand involvement.

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