



Nonprofit board retreats: The pause that refreshes

If your not-for-profit's board is like most, its members lead busy lives. They may not get to every board meeting or perhaps they're able to attend meetings only via teleconference. That's why it's important to periodically bring everyone together in a relaxed setting. But to be successful, your retreat should be planned to the smallest detail.

Going deep

Board retreats enable participants to get past the mundane topics of regular board meetings and delve deeply into specific issues. To take advantage of this opportunity, do the following:

Get participant buy-in. Don't spring a fully planned retreat on your board without first making sure everyone agrees to the merit of the session and its goals.

Choose the time and place carefully. Once the board agrees to a retreat, turn your thoughts to logistics, which will vary depending on your objectives. An afternoon at a local restaurant may be ideal if the board needs to brainstorm some creative, new fundraising options. Broader agendas or confidential topics will require more time and privacy — perhaps several days at an offsite location. The further you can get board members away from their regular work responsibilities, even if only mentally, the better. That may mean banning mobile phones from working sessions.

Create a detailed agenda. Start your agenda at the end by asking what outcome you want to come away with at the close of the retreat. If, for example, you'd like to end the meeting with a five-year strategic plan, your agenda might start off with time to review the history of your organization and competitive research from other nonprofits. From there, build in time to brainstorm where your donors, beneficiaries, members and other important constituencies may be in five years.

Make sure you include adequate breaks and time for informal social interaction, such as a nice dinner. This will not only keep your board members focused, but also reward them for their efforts.

Don't forget to follow up

Keep in mind that some of the most important work will happen *after* the retreat ends. Be sure to recap all decisions and commitments and make a plan to put your work into action before the board scatters. Follow up by sending members a written summary of retreat discussions and add action items to future board meeting agendas based on those plans.

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