

Starting the Year Right The Board Retreat

Thinking about new beginnings:

The New Year is the time resolutions are made with the hope of doing better in the days ahead. Whenever the year starts for your board-- usually after your annual meeting and the election of new members--it is also time to think about how to do better and steps needed to improve. A board retreat is the best vehicle for doing this.

Why do you need a retreat?

Regular board meetings typically focus on very specific issues that need to be decided. Most boards meet for only a few hours during a given month. A retreat, however, will give a board (and the senior staff involved) the time it needs to dream, to think and to talk about the purpose and values of the organization.

The board members will get to know each other and, as a result of a successful retreat, embrace and commit themselves as a team to the organization's spirit. It can be a time of renewal for the board members who have served for a while and an opportunity for the new board members to become energized about their new assignment.

Setting a date:

The hardest part of arranging for a retreat is setting a date when everyone can come. It helps if "attendance at the annual board retreat" is part of the job description that is given to each board member. That way they understand in advance it is expected that they will attend.

The best board retreats happen over a weekend, when people get away from their home and office environment to a conference center or camp and meet for Friday night dinner, socializing and icebreakers. They then spend all day Saturday together. An alternative is to meet Saturday morning for breakfast and stay through Sunday lunch.

If it just isn't possible to arrange this, you may have to settle for an all-day session. Spreading a retreat over two half days in the same or different weeks is not the best idea because of the risk that different people will attend each session and continuity and bonding will suffer.

Having an outside facilitator

It's a good idea to have an objective outside facilitator who focuses on process. The main reason it helps, is that everyone including the president and executive director can be part of the group and the brainstorming. This helps team building and a feeling that all are equals.

The facilitator need not be a professional but can be some one with a background in youth soccer administration. State and national directors and others can be a valuable resource.

The agenda:

A board planning committee should spend some time thinking about what it is most important to accomplish at the retreat. Obviously getting acquainted is important, but after that:

- Do you need to revise your strategic plan?
- Do you only need to bring people up to date on the contents of the plan and what you have accomplished so far so that you can move forward together?
- Are you thinking of embarking on a major marketing or fund raising campaign and the board needs to consider the priority, impact and commitment that such campaigns entail?
- Are there some major decisions such as a new program or a new direction that need to be discussed more thoroughly than they can be at a regular board meeting?
- Do you need to review the job description of the board members and the executive director and the organizational chart so that everyone understands his/her role?

After the planning committee makes this determination, it is time to meet with the facilitator to outline a process. An experienced facilitator will already have asked the board members (excluding the brand-new ones) to fill out a simple confidential board assessment and return it promptly to him/her. This will help the facilitator work with the committee to design an appropriate agenda

Start with the basics

Whatever the main focus of the retreat, it is essential to start a retreat with the basics. By basics I mean:

- Getting acquainted
- Having an interactive exercise in which people write down their notion of the mission of the organization and discuss their differences (if there are some) so that the mission can be revised, if necessary, and the board can indeed speak with one voice
- Defining the core values of the organization by generating a list and then putting it in priority order.

If a group can get to know each other and then affirm its mission and its priority core values for the organization, it will have formed a base of agreed-upon principles on which to proceed and plan for the future. That is the real purpose of a retreat.