

The Value of Holding Regular Board Retreats: How to Motivate and Involve Your Members

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At the National Legislative Summit, I was approached by a trustee who had been trying for years to get her board to participate in a retreat. Having just been selected as board chair she saw this as an opportunity to demonstrate leadership and involve the full board in planning and participating in a retreat.

However, after years of listening to some of the board members come up with multiple excuses for why they could not or would not participate in a retreat, she knew her work was cut out for her. Questions like, “how should I go about organizing the retreat and getting all members of the

board to attend? How can I get them to understand that we should have an annual retreat? And, how can ACCT help?” surfaced.

ACCT has facilitated over 100 retreats in the last five years. We have collected evaluations for all of them so we have some good data on what trustees value. We also have information compiled by consultant Susan Stratton from the recently completed ACCT Members Survey. (see pages 5–7)

According to the 248 boards and approximately 1300 individual board members who completed the survey, 88 percent hold some form of a board retreat. Of this group, 29 percent have an annual tradition of holding retreats.

Based on our experience, and confirmed by the survey, it is critical to have the support of the president, the chair and some level of involvement by all members of the board in championing the retreat. Negative issues, dysfunction or conflict typically do not motivate members to see the value of participating in a retreat.

Who drives the board retreat?

According to the 1300 individual board members who responded to the ACCT member survey, respondents reported the following:

Who drives the decision to hold a board retreat?

54% College president advocates for the retreat

49% Board chair champions the cause

16% Individual board members champion the cause

11% Board policy

Common reasons boards cite for not having a retreat include: believing it is an unnecessary expense; budget constraints; or unwillingness to dedicate the time.

Based on our experience working with boards throughout the country, here are some tips and a step-by-step outline for developing and executing a successful board retreat.

TIP: Think long term.

The goal should be to incorporate the tradition of annual retreats as a part of the board's routine, not just a one-time event.

1. Start with the CEO. It is critical for your president or chancellor to see the value of regular board retreats. He/she is an important ally in thinking through every step of the process of developing a retreat, organizing the board, and making all the arrangements. Sit down with the president and work out answers to the following:

WHY should the board invest the time and energy?

WHAT should be the focus—board procedures, CEO/board self-assessment?

WHO should attend? The full board and CEO, an external facilitator, senior executive staff?

WHEN would be the best time?

WHERE should the board go to focus all their attention and avoid outside interference?

HOW do we motivate all members to attend? Are there specific topics that would attract some board members? Can spouses be invited to participate in social events?

COST: What can the board afford to spend on a retreat? Could foundation or corporate support be identified?

Sample Trustee Pre-Retreat Survey

Name of College _____

Name of Trustee _____

1. What topics do you believe we should focus on during our retreat?

-
-
-
-

2. When would be the best time to hold the retreat? Please specify the month and days of week that would be best for you.

Month: _____ days of week: _____

Length of retreat: one day one and a half-days
 weekend (Friday–Sunday)

3. Do you have any suggestions on where the retreat should be held?
(Local country club, nearby resort, corporate training center, others)

4. Will your spouse be able to join us for the social parts of the retreat?

5. Do you have any suggestions on an external facilitator?

“If you want the board to commit the time, you have to set the example by dedicating the time to hear from each member...”

2. Survey the total board. If you want the board to commit the time, you have to set the example by dedicating the time to hear from each member on the answers to who, what, when, where, how and how much. *(see pre-retreat survey)*

3. Compile the input from the board members into a table with all of their suggestions under each category. *(see table of responses)*

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4. Discuss the retreat as part of the next regular board meeting to obtain more input and reach consensus.

TIP: Be realistic.

Sometimes it is difficult to get total commitment. Aim for full board participation and settle for as much as you can get. Make this event special for the board. Staff should not approach this as a routine meeting. The arrangements should be within the means of the college but also should reflect the important role of the board.

5. Quickly finalize all arrangements with the president and staff. The more notice the board members have, the more likely they can attend. Providing four to six months notice on location, time, etc., is not too early. Most trustees are busy and need a couple of months notice to participate in a retreat of this type. The president and chair should share their enthusiasm with the board by showing them how much they are looking forward to the retreat.

6. Present information to the full board at its next meeting. Make sure a formal posting of the retreat is properly handled in keeping with the state or local Open Meeting Law. It is important to inform the public and the college that the board will not be conducting regular board work during the retreat and that no formal decisions will be taken. The retreat is an opportunity for trustees to learn, discuss important issues, reflect, and get to know each other better. The board appreciates the opportunity to meet without any distraction and will provide a full report at the next meeting of the board.

7. Provide all trustees with the agenda, reading materials, and travel infor-

Sample Table of Responses to Pre-Retreat Survey	
<p>Suggested topics</p> <ul style="list-style-type: none"> • Orientation for new and current members • Board training • Budget priorities • Policy governance • Strategic planning • Review board procedures and policies • Board/CEO relations • Board self-assessment • Getting to know each other better 	<p>Suggested time and dates</p> <ul style="list-style-type: none"> • 4 trustees prefer a weekend • 3 trustees prefer starting on Friday evening • 1 trustee prefers two hours after regular meeting • 5 trustees are flexible • 6 trustees prefer the months March, June or October • 2 trustees are flexible • 4 trustees prefer no summer months
<p>Suggested locations</p> <ul style="list-style-type: none"> • 4 trustees prefer the local country club • 7 trustees prefer going away for the weekend • 3 trustees prefer having the retreat at the college • 1 trustee does not want to drive far • 7 spouses will participate in social (dinners) aspects of the retreat 	<p>Suggested process</p> <ul style="list-style-type: none"> • 6 trustees prefer having an external facilitator • 3 trustees prefer a speaker who can address future directions for the college • 4 trustees prefer no speaker

ation at least two weeks before the date of the retreat.

8. The retreat must be meaningful and relevant, or it will be difficult to secure future attendance. In the next issue of the *Trustee Quarterly* we will provide more information on setting the agenda for a successful retreat, how to identify an experienced facilitator, what role the CEO should play setting ground rules and effective retreat techniques.

I encourage you to e-mail or call me and share what has worked for your

board. How have you been able to incorporate a tradition of having effective board retreats? Let us know what works for you. ■

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