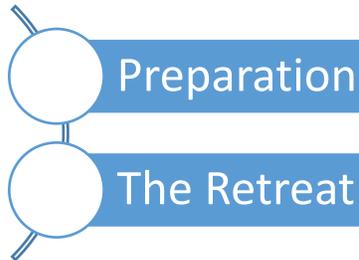




MAKING THE MOST OF A RETREAT



A full-team retreat around the middle of a planning process is highly desirable. Many groups find that a two- or three-day retreat, with some downtime built in for enjoyable activities and camaraderie, is well worth the investment. Most groups should devote at least one full day to their retreat.

Preparation

Site and logistics

Ideally, your retreat will be in a location other than the organization's office or other regular meeting places. It should be a place where participants will feel relaxed and be undistracted.

When selecting your site, keep in mind practical considerations such as food, drink, lodging, accessibility, size and configuration of the main meeting room, ventilation, and lighting, whether you will need A/V and reliable internet, and cost.

The most significant investment you are making is the full group's focused time together. The retreat is important not just for your current planning process, but for the group's morale and cohesiveness over time. It's worth investing some money in a choice location to get the most out of it.

Participants

Strategic planning is one of the fundamental roles of a board. The retreat is a pivotal point in the process, so all board members should participate. Setting firm dates for a retreat far in advance – even a year or more – will help maximize board participation. Aim for 100%.

Most smaller groups should invite all staff. Larger groups may need to limit participation to select staff, for budgetary or other practical reasons.

Some groups invite a few outsiders to attend their strategic planning retreat. If you invite outsiders, be clear what their roles are and which portions of the retreat you would like them to participate.

An outside facilitator can be very helpful. If you choose not to have one, the board chair should either facilitate the retreat or designate one or more other staff or board members to do so. Inside facilitators should have proper facilitation skills, ample time to prepare, set clear roles, and the trust and confidence of the group.



Keep in mind that those facilitating will not be able to contribute nearly as freely to the discussions as they would otherwise.

Materials

Distribute retreat materials before the meeting to give ample time for participants to review the contents. Insist that all participants read it thoroughly before the retreat.

Select the retreat materials carefully. At a minimum, include:

- Last strategic plan
- Brief summaries of the work done to date in this process, including the retrospectives and projections regarding program, money, and people
- Objectives and agenda
- Logistical information

In most cases, this should be about enough. The materials should inform participants and provoke advance thought without overwhelming them.

If you have already outlined or developed drafts of some portion of your new plan, include those in the meeting packet. Alternatively, you might add a small number of short papers outlining some key issues and options for the full group to consider.

Agenda and meeting plan

The retreat agenda should clearly state the desired outcomes of the meeting and an overview of the use of the time together. It need not be a highly detailed, minute-by-minute agenda. It's better for it to be high-level, to allow some flexibility based on how the meeting develops.

Consider organizing much or all of the discussion around your key strategic questions. By this point, some of these questions may have been adequately addressed. If so, simply explain how and why, and move on. Focus time and energy on the most important remaining questions that deserve the time of the full group.

Think carefully about whether to spend some of the time in small-group discussions. They can be helpful in terms of brainstorming and giving all a chance to contribute – particularly if the group is large. However, it does take time to break out, reconvene, report out, and summarize. Sometimes it is better to remain in the full group and facilitate actively, to ensure that all who wish to contribute can do so.

The Retreat

Proper preparation can set up a retreat that is productive, enjoyable, and energizing. Aim for that and conduct the meeting accordingly. Set a tone of curiosity and exploration.

The retreat is not a typical board business meeting. While the formal adoption of the final plan will be the board's responsibility within a few weeks or months, this is a time for board and staff to collaborate freely. The board needs staff perspective and input in strategic planning, especially at this point. Staff will implement the plan, so they need to understand the reasoning behind it and feel joint ownership of its development.



Be sure the group knows from the start that not everything about the new plan needs to be determined at the retreat. Explain who will do what to create a draft plan after the retreat that builds on the full-group work and when it will be complete. Emphasize that the focus at the retreat is on having good, in-depth discussions of a few major questions that have emerged up to this point in the process.

The retreat will be a longer-than-usual meeting, so take steps to keep people feeling energized and mentally sharp. Mix up the seating arrangement from time to time. Pay attention to room temperature and other comforts. Provide snacks. Take adequate breaks.

Don't let it start to feel like a forced march. You don't need to "land" every single topic at the retreat. You certainly don't need to leave the retreat with the plan's exact language finalized. Give each important question a reasonable amount of time, then move on. If you do not achieve clarity and consensus, simply note that, summarize the range of views and ideas that have been heard, and suggest who will work together after the retreat to craft recommendations for the planning team.

Stick reasonably close to the agenda, unless the group agrees to change it. It seems that there is always more to say about strategic questions; they tend to take just as much time as we give them. But there is a point of diminishing returns. Facilitate the meeting as actively as necessary to keep the conversation engaging and productive. Stay on track to achieve the meeting's objectives.

There should be a good record of meeting highlights, consider having someone capture highlights on flip charts while someone else takes detailed notes. Be sure to circulate the notes to the planning committee and possibly all who attended the retreat, to capture essential discussions, outcomes, and to-dos.

By all means, reserve a generous amount of time at the end for a meeting recap, identification of next steps, retreat evaluation, appreciations, and celebration. It is far better to cut some topics a little short than to shortchange the grand finale. End on a high note.

Then, *maintain momentum*. Convene your planning team within a few days of the retreat to compare their thoughts, determine who will work on any remaining major questions, and establish the timeline for completion of the plan.