

Annual Retreats, Part 1: Why hold a board retreat?

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It is the responsibility of elected and appointed leaders to set a vision and direction for their communities. This function involves convening the stakeholders who can influence the future and modeling [strategic leadership](#) so they can all align their work with the shared vision.

Why hold a retreat? Often this strategic work begins with a one to two day retreat, which can serve multiple purposes. Here are some examples:

- Provide an opportunity for board members to learn more about each other's motivations, interests, and work preferences,
- Clarify their mutual expectations, goals, and identity as a governing board,
- Receive information about key issues or the current state of the jurisdiction,
- Establish broad priorities for the organization or community,
- Develop strategies that are consistent with community values, resources, and limitations, or
- Define what "success" or "progress" will look like.

This posting considers some basic elements of putting together a successful retreat, including a link to a [retreat planning checklist](#).

Advantages of treating this work differently Retreating from the normal course of business allows governing boards a more relaxed setting that encourages strategic thinking while building relationships. It provides an opportunity to clarify what the board members hope to accomplish together. Ideally, participants will have open and frank discussions about both the critical issues facing their community and their working relationships.

To be successful as a board, both the strategic focus and daily practices are important. Ideally, a retreat should be a balance of how the board expects to do its work (process) and what the board wants to accomplish (goals).

Begin with a realistic budget To begin the planning process, first discuss how or whether the group might benefit by using a facilitator, and agree upon the budget for this event. Ensure the budget is adequate to cover the facility, food, and facilitator. A facilitator's daily fee can range up to \$2,000. Be sure to ask what the rate is applied towards, e.g., pre-event planning, on-site

facilitation, and/or post-event documentation. If the group does decide to use a facilitator, the next step is to consider [which facilitator might be best suited for the circumstances](#).

Given that board retreats are time-limited but could focus on a wide variety of objectives, it is important to hold a planning meeting to set the intention for the retreat. This will be addressed in the next blog post.