

If You Don't Want Your Board to Get "Into the Weeds" . . . Stop Holding Your Retreats in a Vacant Lot

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We're nearing the end of board retreat season: the window of time between December, when elected officials are sworn in, and April, when budget deliberations start in earnest. All across North Carolina, local governing boards and managers hold retreats during this time to plan for their community's future, strengthen working relationships, and make strategic choices about how to best allocate resources to achieve their goals.

As a frequent facilitator of local government board retreats, I often ask participants if there is anything in particular they would like me to do—or not do—to help them have a productive session. One of the most common responses from managers is "Don't let them get into the weeds." Board members sometimes echo this wish: "Pull us back if we get into the weeds." My colleague Donna Warner even invites meeting participants to use a non-verbal signal, holding up both hands and wagging fingers in front of their faces to signify "We're in the weeds." It's enough to make a facilitator pack some herbicide along with the markers and flipchart pads!

The concern about being overly focused on details is a valid one. Retreats are the place to think strategically more than tactically; the place to sketch out the big picture of what you want to create, not necessarily to identify each task it will take to get you there.

Ironically, the very person who may be most frustrated about the board's tendency to spend time on the incidentals instead of the major issues is also the one who is most likely to contribute to it—the local government manager.

Here are a few ways I've seen managers (unintentionally) design retreat agendas that invite board members to stroll down a weed-choked path:

- **They ask board members to submit a list of retreat topics** and then feel obliged to

address each of them, even if the topics include “broken streetlight on Main Street.”

- **They ask department heads to make presentations that include budget requests,** which then leads to a board discussion about the number of chairs needed in the new training conference room.
- **They don’t ask the board to identify an overall purpose or desired outcome for the retreat,** so each board member feels free to define the “appropriate” level of detail on each topic in his or her own way.

How can these trips into the weeds be eliminated—ok, not eliminated, but at least minimized? Recognize that the greatest point of leverage is during the planning for the retreat, not the retreat itself. Ask the board to begin its retreat planning by answering this question: What do we need to accomplish to consider the retreat a success? Once the desired retreat outcome is established, it becomes easier to filter out the possible agenda items that don’t move the board toward this goal.

What are your tips to help retreats stay relatively weed-free?