

THE THIRD SECTOR REPORT

## **The Board Retreat: Facilitating Magic or Mayhem**

*By Jeffrey R. Wilcox, CFRE*

Sometime this year, most nonprofit organizations are going to have a board retreat. It's that half-day, full-day, or weekend gathering of board members, convened at an off-site location, that finds most of the attendees scratching their heads about what's going to happen to them in the name of trying to help others with their volunteered time and contributions.

Interestingly enough, the word "retreat" has two very different connotations. On the one hand, to retreat is to back away from the enemy, potential danger or something disagreeable. Its roots are in reacting to power.

On the other hand, the concept of a retreat has a long history in religion, the roots of today's nonprofit sector. To retreat is to create a space for meditation, reconnection, introspection and renewal. Retreats are considered essential to the practice of Buddhism. In 1922, Pope Pius XI proclaimed St. Ignatius of Loyola as the patron saint of spiritual retreats.

For most organizations, board retreats, by their very nature, bring to the table a number of wild cards in the forms of printed agenda, hidden agenda, personal agenda, power, opinion and facts under the guises of a mission statement, a deliberate process, and a stated outcome.

Disregard the powers of three guises and it's a one-way ticket to a board retreat disaster. Without experienced facilitation at work, the retreat's outcome will be missed, the players can walk away further divided than united, and the gathering will be cast as a waste for years into the future.

A retreat is an event and should be treated as such if the party-goers are to leave satisfied. In its simplest form, a successful retreat has four components and each must pull its weight in order for a group to move successfully from a starting place to a stated finish.

The first two components are a clearly stated purpose and a defined process. What retreat planners may want as the purpose may not be what the purpose needs to be. If a board isn't fully buying-into its role and what constitutes good governance, any other topic is moot. Organizations that don't take serious board member orientation, proper on-boarding, board assessment, and regularly discussing best practices in nonprofit governance, a recipe for a disastrous board retreat is already in the making before one has even been scheduled. The best reason to hold a retreat is to unify a board to do their best work throughout the entire year. Other purposes are to conduct a deep-dive on a specific issue, create space for creativity, invite directed dialogue with experts and stakeholders, or construct a process. Never expect a multi-purpose retreat to accomplish what it set out to do or follow a timed agenda.

Retreat participants should be aware of a process before they are thrown into it. The best way to take care of this is to have a team that includes the facilitator present the purpose and the retreat process at a board meeting prior to the retreat. Building anticipation about the retreat is key, otherwise, the default position will be anxiety.

The other two components are offering a variety of means of participation and a prescriptive conclusion. Good retreats are a balance of small and large group discussions and directed activities. Participants should have “jobs” among their peers like reporter, recorder, or presenter of facts.

In the end, “What have we actually accomplished?” and “Where do we go from here?” are the two questions that must be plainly answered. A team, including the facilitator, must put retreat follow-up on a future board meeting agenda or it will be lost.

When a retreat does go south there may be a bigger reason than meets the eye. The facilitator is an easy scapegoat. The reality may be, however, that there has been a significant dysfunction that has been eroding the board’s effectiveness long before the retreat started. Addressing the dysfunction is a better reason to have a retreat than watch it destroy one.

Based on its religious roots, a mission-driven cause can unleash the stewardship potential of its trustees with an inspiring, informative and introspective retreat. To simply throw together a gathering to fulfill someone’s agenda or avoid certain topics grows roots that’s more about retaliating than retreating.

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