



October 2010

BOARD RETREATS INSPIRE STRATEGIC ADVANCEMENT

BY REBEKAH LAMBERT

There's a Chinese proverb, perhaps military in origin, which advises: "Always keep a place to which you can retreat." That maxim can also apply to arts and cultural organizations as well. But too often organizations don't take the time to draw back, to think beyond the new production or exhibit - or the latest budget crisis - to focus on the big picture. Board and staff leadership of arts and cultural organizations rarely give themselves the "luxury" of time and energy spent in exploring the most important and fundamental issues of their organizations. An effective retreat provides that opportunity and much more.

A retreat allows board and key staff members to concentrate on critical matters that affect the future of their organization. It can be used to review and discuss an organization's mission, vision, and values. It can be the setting for a thorough board self-assessment, educational opportunity, and time for the board to truly self-govern. A retreat can also be the venue for an organizational SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis leading to a situation where it can simultaneously learn from its past, live in the present, and look to the future in order to identify its key goals and priorities. It can concentrate on a specific problem or, alternatively, encourage participants to think more broadly about the purpose and uniqueness of their organization. It can be used to educate board members on a topic of relevance critical to the future success of the organization. And, regardless of the agenda, a board and staff planning retreat can build camaraderie and common purpose among organizational internal stakeholders.

Characteristics of a Good Retreat

Whatever its purpose, an effective organizational advancement retreat has certain characteristics, including:

- Relevance and a clearly defined agenda with enough flexibility to allow for meaningful discussion and to accommodate any unexpected topics of significance that may emerge.
- Concrete and actionable items with a clear plan and timelines for post-retreat follow up.
- Active participation of attendees that leads to support, commitment, and consensus among board, executive, and artistic leadership.
- Creative thought and open dialogue in a collegial atmosphere.
- Achievement of something that cannot be accomplished in the regular, ongoing work and meetings of the board or staff.

What a Retreat is Not

It is vitally important to have a clear idea of the purpose for a retreat, which must also include an understanding of what a retreat is not intended to accomplish. In most cases, a retreat is unlikely to resolve a major issue that takes weeks or months to resolve. However, it may help a group arrive at the decision to address that issue and to identify the planning process steps that will lead to resolution. There are typically no official board votes or decisions made at retreats, but rather consensus on several specific, measurable, attainable, reviewable, and time sensitive goals. The overarching purpose is to simply encourage input and inspired thinking and a plan that leads to improved board policymaking, governance, community ambassadorship, and fundraising.

Who Should Be Included

Selecting participants for a retreat depends primarily on its agenda. For a planning retreat, an arts and culture organization should include, at a minimum, its entire board (in the cases of very large boards, the executive committee may suffice) and senior management and artistic leadership. In addition, an organization should seriously consider how or when to include artists, the leadership of affiliated volunteer groups, and other stakeholders.

In some cases, the goal of the retreat may mandate particular attendance. Thus, if the agenda includes discussion of sensitive or confidential issues, participation would be understandably limited. However, an agenda that includes, for example, discussion of a new strategic initiative, facility development, or major organizational shift may warrant the broader inclusion of neighbors, community leaders, or colleagues from other organizations. Essentially, anyone whose insights and valuable input would contribute to building momentum to advance the organization should be included on the retreat invitation list.

Why Use an Outside Facilitator

Most effective retreats use an experienced facilitator, someone who helps the organization's leadership plan the agenda, and then objectively conducts the meeting and steers the discussion. Keep in mind that an internal stakeholder as facilitator can be perceived as having his or her own agenda or subjective point of view. An effective outside facilitator will:

- Review program plans, financial information, strategic plans, fundraising materials, newsletters, and other organizational information in advance.
- Speak with board and executive leadership to ensure that they understand the dynamics of the participants (i.e. "know your audience").
- Ask perceived "naïve" questions that help the participants answer tough core questions about the "why" of the organization rather than the "how."
- Keep the group focused on the agenda and goals of the retreat.
- Ensure that discussion is concentrated on key high-level issues rather than focusing on daily operations or unnecessary details.
- Provide industry benchmarks, comparisons, and expertise. Address difficult questions in a diplomatic manner.
- Ensure that everyone participates in the discussion and that it remains cordial and inclusive.
- Push the group beyond "talk" to the identification of concrete action items.
- Prepare a post-retreat summary that clearly articulates the discussion and clearly identifies the next steps, timelines, and who is responsible for implementation.

Board Self-Assessment

Ultimately, a retreat is a time of self-reflection when utilizing a thorough board self-assessment tool. As it's been said, "a board doesn't know what a board doesn't know." The boards of arts and culture organizations need dedicated time to discuss and improve upon their own performance separate from the measuring management or organizational effectiveness. A BoardSource survey conducted in 2007, however, found that only 52% of boards did a formal, written evaluation of their performance, although 93% indicated an interest in board training.

An effective board self-assessment has myriad benefits, as it can:

- Educate board members on their overarching roles and responsibilities.
- Create an opportunity to objectively and openly review board performance.
- Illuminate areas of strength as well as areas for training and improvement.
- Prioritize goals and create a specific plan exclusively focused on board development.
- Provide an orientation for newer board members and a review of responsibilities for existing members.
- Clarify board roles as separate from staff roles.
- Demonstrate board integrity and accountability to staff, donors, and other constituencies.
- Engage and motivate board members to maximize their strengths.
- Build camaraderie and strengthen internal stakeholder relationships.

A thorough board self-assessment can begin with an anonymous survey (print or online) of board effectiveness, distributed to all board members and key staff members. The survey may include questions about mission and vision, board operations, strategic planning, board membership and development, board-staff partnerships, financial stewardship and fundraising, and more. The retreat facilitator administers the survey and then analyzes, interprets, and reports on the results at the retreat to elicit feedback on areas of both strength and weakness. During the retreat, the board responds to those results and develops an action plan to advance both the board and thus the organization.

Organizational SWOT Analysis

An organizational strengths, weaknesses, opportunities, and threats (SWOT) analysis is yet another effective use of retreat time to set or update organizational objectives. SWOT is a clear-cut and effective strategic planning tool, which quickly identifies areas to build upon, challenges to remedy, opportunities to prioritize, and threats to respond to. Strengths and weaknesses are generally internal and reflect the snapshot of the organization today learned from its recent past. Opportunities and threats are external and can look to the future. A thorough, facilitated SWOT brainstorming discussion will efficiently produce four lists to discuss, compare, and use to identify strategic action items. Ultimately, organizations should be in a better position to capitalize on their strengths and opportunities while mitigating their challenges and understanding the potential threats that are largely out of their direct control (i.e. economy, demographic shifts, etc.).

Outcomes of a Good Planning Retreat

The concrete outcome of a good retreat is a cohesive game plan, a written prioritized action plan which includes who is responsible for follow up and a timetable for doing so. Beyond that, participants in a well-planned and effective

retreat emerge with an affirmation of their commitment to the organization, its programs, educational initiatives, and community impacts. Additionally, participants typically have a better understanding of institutional purpose, a sense of accomplishment, and a greater connection to their colleagues. A good retreat likely includes some laughter and perhaps some tears while building trust and rapport. Ultimately, the ability to "retreat" allows people to be strengthened and better equipped to "advance" the organization's mission and vision for the vibrant future.

Sources

Hughes, Sandra. *To Go Forward, Retreat!* BoardSource, 1999.

Styers, David. *Board Assessment Tool Workshop*. A seminar at the League of American Orchestras Conference, June 16, 2010, Atlanta, Georgia.

[Provided courtesy of Arts Consulting Group, www.artsconsulting.com]