

Effective Board Retreats 101
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BOARD RETREAT TIPS

1. **Start with Why:** A well-planned retreat begins with clarity about the desired outcomes of the gathering. Examples of some ways to focus a retreat follow:
 - a. **Establish and Deepen Board Culture** – How we do things around here? What do we want to change? What can we commit to as a board culture? What have we learned from the most recent board evaluation? How does that feedback influence the board’s work and practices this year?
 - b. **Induct/Onboard New Trustees** – After a Board Orientation session, a board retreat brings new trustees into the culture of the board by creating opportunities for trustees to get know each other better and begin to see how the board functions as a group of individuals acting as a whole.
 - c. **Inspire Trustees to Fully Engage During the Board Retreat and for the Year Ahead** – What desired trustee engagement includes, understanding the “lanes” that are appropriate for trustees as well as what straying outside of the trustee role looks like.
 - d. **Strategic Planning** – With enrollment management and financial stability being priorities for many schools, strategic plans may need to take a pause in this extraordinary year. Keeping goals realistic and sufficiently fluid will help ensure the school can navigate these times.
 - e. **Role Realignment** – After the disruption of last spring and the intense planning needs over the summer, it may now be time for trustees and management revisit their respective roles, according to best practices and to plan for any needed realignment.
 - f. **DEI** – What are the board’s strategic and tactical actions to support and advance the school’s commitments to DEI and racial justice?
 - g. **Annual Goal Setting** – Defining process and timeline for the board itself and for committees. How do the annual board goals intersect with the head’s goals? How do the head’s goals intersect with those of senior leadership? What is the process for monitoring/reporting against the board’s goals? The HOS’s goals?
 - h. **Clarity on Decision Making** – Establish clarity, where needed, around the decision-making roles of the board and management, especially in this Covid-19 environment. Establish the related communication processes to ensure that the board as a whole can support the school’s instruction delivery options and that individual trustees have the appropriate talking points to be community ambassadors.
2. **Consider a Facilitator:** Once you have clarity about the desired outcomes or focus for the retreat, who is the best person to facilitate it? Often this is an outside person.
3. **Timing:** Some boards hold an annual retreat, usually in the fall or spring. In either case, a primary purpose is to consider where the school has been and to prepare for the year ahead. Many schools hold their retreats in the fall as a way of inducting new trustees to the board’s culture. Those holding retreats in the spring can draw on the wisdom of trustees finishing their terms; sometimes trustees-elect are invited to a spring retreat to be a part of these conversations. Other boards may hold a mini-retreat as a part of regular meetings.

4. **Select a Venue:** A board retreat offers dedicated time for trustees to create and further a sustaining board culture as well as an opportunity to gather and share ideas outside the usual business of the board. Meeting in person and away from the school invites a social subtext to the business of the day. It also invites broadened perspectives, and a new way of seeing each other and the issues. In a Zoom environment the timeframe and the agenda will be more compressed. Even so, ensuring that everyone shows up face to face and ready to fully engage is a priority.
5. **Agree to Communication Norms:** Take time to ease the group into an environment of shared agreement on communication norms, if that isn't already a part of your board culture. (See Resources.)
6. **Time to Connect:** Invest opening time to help trustees get to know each other in new ways and to better value what brings each one to their commitment to serve on the board. Okay, maybe you groan at the thought of an ice-breaker. But if the ice-breaker deepens trustees' appreciation for each other and connects to the goals/themes of the retreat, it is an activity well worth the time investment. (See Resources for some excellent ideas.)

POTENTIAL BOARD RETREAT OUTCOMES

- The board is engaged and committed to their roles as individuals and as a board
- Trustees better know each other
- Board culture is stronger; roles and boundaries are clear
- The board is committed to strategic initiatives and generative conversations
- Board committees are well organized and goal oriented

May your board retreat be that value-added experience that strengthens your board for its vital work.

BOARD RETREAT RESOURCES

- [Governance as Leadership](#), Richard Chait, William Ryan, & Barbara Taylor
- [NAIS Trustee Handbook](#)
- [Toward a Zoom Agreement](#), Seth Godin
- <https://dschool.stanford.edu/resources/the-bootcamp-bootleg>
- <https://iscachairs.org/> – Consider joining the Independent School Chair Association
- https://www.sais.org/page/trustee_videos
- [Super Boards by William Mott](#), which includes useful case studies
- [Sample Communication Norms from the UCSF School of Medicine](#)
- [Best Warm-ups for Virtual Meetings](#)