The School Board "Retreat:" A Planning Guidesheet

The practice of sojourning into "retreat," stepping off the grid for a few moments of focused discourse and discovery on how an international school board will fulfill its governing responsibilities, is essential for a number of reasons. Not only does it fulfill the accreditation mandate for professional development of the board itself, but a carefully designed Retreat also promotes the sense of team within the Board and partnership with the Head of School.

Critical to the effectiveness and efficiency of time spent "on retreat," is the care given to planning the process, from determining the purpose(s) of the Retreat to finalizing logistics and follow-up after the retreat..., all consciously focused on ensuring a Retreat that best serves the Board at that particular time. This planning guidesheet can help in that process.

Step I **WHY?**

Clarify the purpose(s) of the Retreat

- ☐ Explore and affirm Principles of Good Governance
- ☐ Orientation new Board members
- ☐ Team building
- ☐ Goal setting
- ☐ Address specific issue(s)
- ☐ Board culture/operational norms

Step II **WHO?**

Determine who the "audience" is; who should attend (based on context and purpose)

- ☐ Executive Session members/voting members and Head of School

Also might consider:

- ☐ Ex-officio members
- ☐ Senior Leadership Team (principals, business manager, etc.) ???
- ☐ Faculty representative ???
- ☐ PTA representative ???

Step III **WHEN?**

Decide the best time of year to achieve the established purpose

- ☐ Beginning of academic year; set the tone for the year
- ☐ Mid-year; after the "team" has started to form and current issues are apparent
- ☐ End of academic year; review the self-appraisal, handover to new Board members, set goals for the next year

Sept IV **HOW?**

Choose the best mechanism to serve the purpose and context

- ☐ Use the HoS or a Board member as coordinator
- ☐ Use a local "facilitator" (not a member of the Board)
- ☐ Use an outside, experienced school board retreat facilitator
- ☐ Information-based
- ☐ Activity-based

Step V **WHAT STRUCTURE?**

Determine best timing and location for the Retreat

- ☐ Two workdays (12-14 hours)
- ☐ One evening (working dinner) & all day the next day (10-12 hours)
- ☐ Two successive evenings (working dinners) (8-10 hours)
- ☐ One day (7-8 hours)
- ☐ Other (how many hours ___; over how many days ___)

... and...

- ☐ On campus
- ☐ Off campus

Step VI **WHAT OUTCOMES?**

Identify the topics to be covered, outcomes achieved, and agenda to be followed.

- ☐ Select topics from "Board Professional Development Topics - The 'Menu' of Choices"
- ☐ Confirm Outcomes (with guidance from consultant)
- ☐ Approve Agenda (drafted by consultant)

Step VII **LOGISTICS**

Arrange conference site, catering, set-up, consultant lodging, etc.

Step VIII **FINAL RETREAT PREPS**

Prepare Board members for the Retreat

- ☐ Calendar the Retreat in the Board Annual Calendar
- ☐ Introduce the consultant/describe the model
- ☐ Board members complete pre-readings provided by consultant before the Retreat

Step IX **CONDUCT THE RETREAT**

Step X **FOLLOW-UP**

Ensure action items from the Retreat are addressed; review Retreat Evaluations to capture "lessons learned" to guide planning for next year's Retreat.

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