6 Essential Secrets for Board Retreats That Work

Turn Your Board into an Effective Fundraising Team

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Why Hold a Board Retreat?

Has your organization had a board retreat in the last 12 months?

What about in the last 3 years?

...10 years?

If you’re like many nonprofit organizations, you fall into one of two common camps with regard to board retreats:

- You don’t have them nearly as often as you should (haven’t had a retreat in the last 12 months), or...
- You have them annually, but don’t necessarily get everything you could out of them.

If either of the above sounds like your organization, this book is definitely for you! But before we talk about the Six Secrets for making your board retreats a success, first we need to step back and talk about what board retreats are and why they’re so important.
Sometimes (actually, too often), a new client will ask me why they should hold a board retreat in the first place:

“We have six (or twelve) meetings a year - isn’t that enough?”

The answer is, “Absolutely not!”

Why? Because a board retreat is not the same thing as a board meeting. Board meetings are about taking care of the month-to-month business of your organization; board retreats are about creating and reviewing your organization’s long term strategic plan and revisiting your vision and mission.

Here are some other important ways that board retreats are different than your regular meetings:

Your board members fit your regular meetings into their monthly schedules and are frequently attending right after work. Therefore, they’ve got a lot on their minds besides your organization. Board retreats, on the other hand, are half- or full-day affairs that allow your members to concentrate fully on the tasks at hand.
Team Building

The nature of most board meetings leaves little time for members to network and get to know one another — board retreats provide them the time they need to not only do this, but to mold themselves into a team that is ready to work together. Retreat time is particularly important for new board members, who are able to get a fuller picture of what's expected of them by getting to know and following the lead of your more experienced members.

One of the reasons that many board members give for serving on boards is to networks with the other trustees. You want them to get to know and enjoy one another’s company, so they will want to attend your meetings.

Fundraising Training

While I encourage you to incorporate a discussion on fundraising and fundraising training into each board meeting, a retreat is a unique opportunity to provide training as well as to have an in-depth discussion around fundraising.
Strategic Planning

Do you need to create a new strategic plan or provide updates to the one you have? It’s important to review your strategic plan on an annual basis, and a retreat is a perfect place to do that. Are you doing what you said you would do? Are you falling behind or have you accomplished more than you thought you would? There is never enough time at a regular board meeting to do a thorough review.

Passion

Another, and equally important, reason to hold retreats is that, when done well, nothing energizes board members (and top staff, too!) like a board retreat. If you want to build a pro-active board that understands and is eager to fulfill their roles in both governance and fundraising, board retreats are an essential element to make it happen. Be sure to include a “mission moment” where you reenergize you board members about your mission.

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Collectively, these differences are some of the reasons you should be holding a board retreat every year.

Now that we've talked about the “what” and the “why” of board retreats, let’s dive into those Six Essential Secrets, so you can start planning your next board retreat today.
Secret #1: Your Retreat is NOT Just a Longer Board Meeting

As I stated before, one of the reasons your organization needs to hold board retreats is that retreats are very different from regular board meetings. Board meetings are about the month-to-month business of your organization — retreats, on the other hand, serve the following purposes.

1. Re-energize and re-engage your board.

Engaging with your organization’s core mission frequently boosts a board’s energy. After all, your organization’s mission — the work you do — is the reason your board members decided to join in the first place! To do this, be sure to include a “mission moment” during the retreat. Have a client speak, read a letter from a grateful patient or parent, show a short video, etc. — anything to remind your board why they are there.
Always remember that your board members are volunteers who are fitting their work with you into their busy lives. They may or may not have time to closely follow your work in between meetings, so it’s up to you to make it clear to them that they’re making a real and measurable difference!

2. Review roles and responsibilities.

Not all of your board members may be familiar with what is expected of them, so it’s a good idea to review this at your board retreat. You can provide them with a board member expectation form or board member job description which includes responsibilities like:

- Attend and participate in meetings
- Serve on at least one sub-committee
- Attend organizational events and bring friends
- Provide financial support (personal contribution)
- Help with fundraising
- Provide financial oversight
- Oversee governance
- Act as an advocate for the organization
3. Plan for the year.

Board retreats are the place where you create or update your strategic plan. If appropriate (depending on the size of your board), you can break into groups to review and evaluate your plan. Did you accomplish what you set out to accomplish? Are you on track or did you fall behind? Is the plan still current and valid? Have you come to the end of your plan and need to create a new one?

4. Raise more money.

Retreats are fantastic opportunities to engage your board members in fundraising. Discuss the importance of 100% participation, and provide specific opportunities for each board member to get involved in the fundraising process. Provide fundraising training — this could include everything from role-playing to talking about how to get an initial donor meeting to discussing planned giving.
5. Networking and socializing.

As I mentioned, board meetings themselves aren't very good places for your members to get to know one another. It's hard to feel a sense of ownership of an organization when you're working with strangers. Therefore, your retreat needs to include time for participants to network and socialize with each other - both at the beginning with an ice-breaking exercise, during the retreat at breaks and lunch, and, ideally, at a dinner together after the retreat to celebrate everything you've accomplished.

Create a Board Retreat Schedule

On the next page, you'll find a sample board retreat schedule taken from a shorter version in my blog. Obviously you'll need to customize it to fit the particular needs of your organization, but in my years of experience as a board retreat facilitator I've found that scheduling retreat activities in this order increases the chances for success, particularly in terms of engaging your board in giving — and getting — funds:
Sample Schedule:

i. Ice Breaker or team-building exercise
ii. Mission Moment
iii. Review board roles and responsibilities
iv. Strategic planning for the year
v. Fundraising training (how are you going to fund the strategic plan)
vi. Strategic discussion about a key issue your organization is facing
vii. Wrap up - sum up accomplishments, break for socializing

You'll of course want to include regular breaks and lunch, too.
Secret #2: “Location, Location, Location”

If possible, you don’t want to hold your retreat in the same location in which you hold your board meetings.

Why? Because it will get board members out of the same old board meeting routine. Plus, it’s fun to try someplace new.

If funds are an issues (and they always are), find out if a board member has a meeting room you can borrow for the retreat.

Choosing a Location

Here are the things to keep in mind when choosing your retreat location:

Privacy - Make sure you are in a private meeting space, where the door can be shut. You don’t want to meet where there might be noise or interruptions.

Food - You will want to provide the best food you can afford — at a minimum snacks and drinks, but a meal is nice too.
**Location** - Seek a venue that’s as centrally-located as possible so none of your board members are stuck with a long commute. (If your board is widely dispersed, alternate geographic locations so the same people aren’t making the long commute every year.)

**Electrical outlets** - Be sure there are enough for participants to charge their laptops/tablets and/or cell phones as necessary.

**Internet access** - One other thing you may need to consider is whether you need to be able to offer videoconferencing to board members who absolutely can’t make it to the retreat.

**Ambiance** - You want to choose a venue that offers comfortable seating as well as enough room for participants to take breaks to stretch and move around.

Just like we all make decisions about the people we meet based on our first impressions, the location you choose will also give your board members some instant ideas about what to expect from the retreat from the moment they walk in the door. Choose a place that’s attractive, well-organized, and provides for your members’ needs. Do that and you’ll have the basis for a successful meeting before the retreat is called into order.
Secret #3: Do You Hear That? It’s the Sound of Ice Breaking

In addition to choosing the right location, the way you start your board retreat is an essential step for setting a relaxed, focused tone.

When I facilitate retreats, I always start with some kind of ice-breaking or team-building exercise. Doing so results in an energized group of participants who have already started on the path of one of your retreat’s main goals: giving your board members a chance to get to know each other so they’ll be comfortable working together.

Don’t assume your board members know one another. Provide nametags or tent-cards so everyone is comfortable with one another.

There are plenty of ice-breakers, and many are easily accessible with a simple Google search. The next page features a few simple ice-breaking exercises that I like to use when facilitating board retreats.
Try Some of These Ice-Breakers:

1. Go around the room and ask board members to say their name, the reason they joined the board and/or continue to serve, and one interesting thing about themselves that others may not know.

2. Break into partners (or groups of three if there’s an odd number of participants). Have each member of the group interview one another. They can ask each other their names, about their families, what they do for a living, why they joined the board, about their best summer vacation, etc. Make it fun. Give each person at least 5 minutes to interview the other (10 - 15 minutes total). When the entire group comes back together, have each person introduce their partner, repeating some of the things they learned about the other person.

3. Create a “board member bingo” game, except all the slots need to be filled in. Use the sample game board on the next page or create your own. Give each board member a sheet and ask them to stand up, go around the room and find people who meet the criteria, and fill in their names. Once their sheet is full, they can sit down.
**Ice-Breaker BINGO:**

<table>
<thead>
<tr>
<th>Can ride a bike</th>
<th>Has run a marathon</th>
<th>Owns a pet</th>
<th>Plays a musical instrument</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serves on more than 2 boards</td>
<td>Has been to more than 3 continents</td>
<td>Has been to more than 25 states</td>
<td>Has been to more than 10 countries</td>
</tr>
<tr>
<td>Has more than 2 children</td>
<td>Has children living at home</td>
<td>Has been married 25+ years</td>
<td>Loves to surf</td>
</tr>
<tr>
<td>Owns a vacation home</td>
<td>Owns a boat</td>
<td>Worked as a waiter/waitress</td>
<td>Is a vegetarian</td>
</tr>
</tbody>
</table>
Secret #4: Engage Their Minds — and Their Hearts

As you probably noticed while reading about retreat agendas, a well-done board retreat includes segments that engage the minds — and segments to engage the hearts — of your board members.

**Engaging Minds**

Engage your board’s minds by initiating strategic planning as well as discussions about an issue your organization faces. This is important for a few reasons.

1. You get to draw on the unique perspectives and skills of your board members.

2. It’s a board’s job to shepherd nonprofit organizations and make sure they are fulfilling their missions.

3. Finally, engaging with your board on this level is a demonstration of your respect for their achievements and abilities.
The last important point that needs to be made about engaging participants’ minds is that this doesn’t have to be a boring process — on the contrary. Ideally, you will have a planning process that is highly interactive and energized.

**Engaging Hearts**

When it comes to engaging participants’ hearts, I’ve already outlined the importance of including a “Mission Moment” as part of your board retreat agenda. Why is this so important? Because, while most people like to believe that human beings make decisions based on logic and reason, nothing could be further from the truth! Instead, the vast majority of people decide an issue based on how they feel about it; then, we use logic to formulate the reasons for our decision.

Likewise, your board members aren’t giving of their time and treasure because of the facts about your organization — they’re doing so because of how being a part of your mission makes them feel. Of course you need to engage your board with the facts surrounding your organization’s budget, case studies, staffing, and other issues. But if you don’t also engage their hearts, they won’t be with you for long.
Secret #5: Focus on Development, and So Will Your Board

There are three big mistakes I see organizations make when it comes to board retreats:

1. Not having an annual board retreat at all.
2. Not including fundraising on the board retreat agenda.
3. Leaving fundraising until the very end of a board retreat.

So what happens when you leave a discussion of fundraising to the last minute of your meeting or retreat, or ignore the subject all together?

If you don’t see fundraising as a priority — and treat it as such — neither will your board members.

Your organization’s mission is also an important discussion to have. What’s more, it’s an excellent precursor to the topic of fundraising training.
The Mission Moment → Fundraising Discussion

The Mission Moment reminds your board that while fundraising involves soliciting gifts, it isn’t really about money – it’s about what the money allows your organization to do…

- Change lives
- Save lives
- Protect the environment, etc.

Focusing on the end result makes even the most reluctant person more comfortable when talking about raising the funds to make that result possible.

And, fundraising training and discussions shouldn’t be limited to your yearly board retreat. *Far from it!*  

However, your board retreat is your *one chance each year* to cover this topic in great depth and to get your entire board (not just the development committee) excited about it.
Secret #6: To Hire a Retreat Facilitator or Not?

I must admit, I’m biased on the topic of hiring a facilitator. After all, a big part of my work is facilitating board retreats, and doing so is also one of my favorite activities.

Having admitted that, I also need to stress that there are a lot of benefits to bringing in an expert facilitator. And if your organization can’t afford to do so, read on for an alternative option.

Considerations When Hiring a Facilitator

1. The facilitator you choose should be an expert on both fundraising and strategic planning. They should also be an experienced trainer and facilitator.

2. An outsider, by nature, will have a fresh perspective on your organization. A fresh perspective will open up new possibilities and areas for improvement.
3. The outside facilitator is a neutral party, so they are better prepared and able to lead any difficult or controversial conversations that may arise.

4. Using an outside facilitator makes it possible for high level staff to participate in the retreat instead of having to focus on the minutiae of running it.

If you absolutely you can’t afford to hire an outside facilitator, I highly recommend swapping with another organization (your Executive Director or Director of Development facilitates their board retreat, and their counterpart facilitates yours). This is an inexpensive solution that covers three of the four preceding bullets.

As part of the agenda planning process, take a deep look at the specific areas where your board is weak, particularly in regard to fundraising, and look for a facilitator who has additional training and experience in those areas — for example, soliciting major gifts.
Get Planning!

At this point, you have the basics you need to at least begin planning a successful board retreat for your organization.

In the meantime, don't let even another month go by without setting a date and location for your (first or next) retreat!

For more advice on board retreats, major gifts, and other nonprofit topics — particularly development-related topics — I invite you to follow my blog and to check out my full-length books.

In addition, I'm available as a consultant to help with everything from planning the specifics of your board retreat to facilitating it so you can relax and participate along with your board.

Contact me at (201) 970-9766 or amy@tripointfundraising.com. Let's get started!
About the Author

Amy Eisenstein, MPA, ACFRE is a fundraising consultant, author, and the owner of Tri Point Fundraising, a full-service development consulting firm for nonprofits. Amy has raised millions of dollars through event planning, grant writing, capital campaigns, direct mail, and major gift solicitations. Her gift for simplifying the art of fundraising yields big results for her clients and followers.