



Board Retreat Guide

"Life is short and if you're looking for extension, you had best do well. 'Cause there's good deeds and then there's good intentions. They are as far apart as Heaven and Hell."

-- Ben Harper

A Board Retreat provides a unique forum for the school board to build focus, momentum, and unity. Wise planning coupled with a sufficient commitment of resources, time, and energy is the best recipe for a successful retreat. During this time away from the normal routine, you have the opportunity to address some of the larger issues facing the board and the whole organization. This is your best chance to inject fresh enthusiasm and direction into the board in order to build momentum towards a higher level of performance.

Asking board members to commit to a board retreat forces them to make trade-off decisions. You have some very talented people who are busy and have high expectations. This could, however, be the best investment the board and administration could make to advance the mission for greater success. At the retreat you have quality time to consider strategic planning, board culture, organizational goals, enrollment, fundraising, etc. Training can also be incorporated into the retreat, satisfying state and accreditation requirements for board professional development.

Below is a Board Retreat Guide that has been developed to help you keep the meeting planning process simple and effective. By clearly articulating the Purpose, Objectives, Strategies, Schedule, and Expectations for the retreat, your leadership team can maximize the results for everyone.

PURPOSE - *Why are we convening a board retreat?*

Your Board Retreat should provide a strategic direction for the next year, identifying the goals, quality improvements, and performance metrics that will produce the best results possible from the board. This retreat should be different from your routine board meetings because of the specific plans that will be established for improving the performance of the board as a whole and maximizing the contribution of each trustee. After the retreat, board members should say to their family and friends, "That board retreat has given us new inspiration for pursuing the mission! It was worth it!!"

You will want to work through the following issues in order to establish the purpose of your retreat:

- Why do we want to have this retreat?
- What is our goal?
- How are we going to add value to our school through this retreat?
- What would happen if we didn't do this retreat?

After considering these points, formulate a specific Purpose Statement for your retreat:

PURPOSE: _____

OBJECTIVES - *What are the most important results that will fulfill the Purpose of the retreat?*

After identifying the purpose of your retreat, the next step is to generate objectives you would like to accomplish. Identifying specific outcomes and goals will extend the quality and performance of your time, and provide points of accountability. Consider the following questions in order to solidify your metrics:

- What are 3 to 5 specific objectives for this retreat?
- Why are these desired outcomes important?
- Will accomplishing these objectives move you toward your mission?
- How will this retreat enhance relationships among board members and with the Chief Administrator?
- What topics or issues should be discussed? What topics should be tabled?

After discussing and identifying your goals and outcomes, use them to complete the following sentence:

This retreat would be most successful if _____

Focus is the key, so avoid vague goals that cannot be measured and limit the number of goals to no more than five--less is okay.

STRATEGIES - *How will the Board Retreat accomplish these Objectives?*

In this section you will identify strategies for accomplishing your objectives. This is where you get into the nuts and bolts of the planning process, but it is important to remember that even these small details are critical to success. For example, how you arrange your space can have a big impact; the room would look very different depending on if your goal is to facilitate interactive small groups or to initiate a working session that includes the whole board. You will want to think about whether or not you should establish “rules of engagement” for the retreat. An example would be leaving cell phones at home or keeping them turned off in order to minimize multitasking and distractions. You will also want to anticipate potential roadblocks (such as unresolved conflicts) and how you can eliminate them during the planning process or address them at the retreat. In light of your objectives, discuss the following items:

- What is the ideal location for the retreat? What are backup options?
- How can we choose a date that is best for everyone?
- Who is going to attend?
- Should we provide a gift(s) for the board members?
- What materials should we provide?
- Will we bring in a speaker or facilitator? If not who will moderate?
- How should we arrange the space in order to best accomplish our objectives?
- How can we facilitate a constructive, healthy dialogue?
- What are the rules of engagement, if any?
- What are some roadblocks that could derail the objectives of the retreat?
- Who should be on your retreat planning team?
- What information should be collected in advance? (e.g., financial, market analysis, client survey, employee survey, etc.)

- What are we doing extraordinarily well?
- How could we radically improve the value proposition to families?
- Who are our raving fans? What do they want from us?

After discussing these items, create a planning worksheet with the following information:

1. Three possible retreat locations ordered from most to least desirable
2. Two potential dates to propose to the board
3. List of desired attendees
4. Contact information for desired speaker, facilitator, or retreat leader
5. List of materials and gifts (if desired) that will be provided
6. Guidelines for arranging the space
7. If desired, rules of engagement that the board will be notified of beforehand

Consider using a pre- and post-retreat survey. Before the retreat you can collect valuable information regarding the performance evaluation, priorities and opinions of board members. After the retreat you can gain valuable feedback on the schedule and results, improving your planning process for future events.

SCHEDULE - *How will we maximize our time at the Board Retreat?*

In this section you will establish a schedule of tasks and responsibilities leading up to the retreat and an agenda for the retreat itself. All the work you put into establishing a purpose, identifying goals, and developing strategies to accomplish them can fall apart if you don't have a specific path to get them accomplished for the retreat. You will be able to best maximize your time at the retreat if logistics are planned out well in advance. Discuss the following questions to generate ideas for your planning worksheet:

- What tasks need to be accomplished before the retreat?
- What tasks will need to be facilitated during the retreat?
- Who is on the retreat planning team and who should be responsible for these tasks?
- What are reasonable deadlines for accomplishing the tasks?
- How will we provide accountability to ensure the tasks are completed on schedule?
- What items should be on the agenda, and what should be the ideal result of discussing them?

After discussing these items, complete the following tasks to generate a scheduling worksheet:

1. Create a detailed list of tasks that will be accomplished before and during the retreat.
2. Assign responsibility for each task item to a specific person.
3. Assign deadlines for each task.
4. Contact information for desired speaker, facilitator, or retreat leader

5. List of materials and gifts (if desired) that will be provided
6. Guidelines for arranging the space
7. If desired, list rules of engagement that the board will be notified of beforehand.
8. Using the worksheet on the next page, create an agenda for the Board Retreat. Each item should also include a description and ideal result. For example, an agenda item of “Trustee Goals” would have a description of “working group to evaluate and prioritize goals for each trustee” and an ideal result of “unanimous list of goals.”

AGENDA

ITEM	DESCRIPTION	IDEAL RESULT

SCHOOL GROWTH FACILITATED RETREAT

We hope this guide will give you the tools you need to create a successful Board Retreat experience. If you would like to take your retreat to the next level, School Growth offers a facilitated Board Retreat package. While it's possible for someone on the board or in

"What I liked best was the group interaction and idea development. I thought it was a very effective

the school to lead the retreat, you will usually get better results if you utilize a facilitation expert who understands the nuances and best practices of board leadership and group dynamics. Because we are outside of the governance and management structure of the school, we can be neutral with the ability to see conflicts/opportunities that your retreat team might not see and can share ideas from other organizations.

Our experienced board retreat facilitators are equipped with strong communication skills, which helps to keep everyone focused. This includes understanding how to read body language in order to respond wisely and constructively to various points of view. The School Growth facilitator knows how to encourage participation from every member of the board.

Prior to your retreat, we will conduct research on your school, talk to your employees and families, and consult with your board's leadership to identify issues and challenges to discover opportunities for growth. The results of this inquiry will be shared at the retreat to help the board reflect and set goals.

"The information was presented in a very organized manner. The small groups helped put

The end result will be a strategic direction for the next year, identifying the goals, quality improvements, and performance metrics that will produce the best results possible from the board. Your trustees will be introduced to *The Board Index*, a graphical web-based dashboard that can be used to track the board's progress and provide on-going feedback. At the end of this retreat, your board members will be ready to commit themselves to providing the timely responses required to maximize the benefit from this retreat to assess growth, quality, and effectiveness.

To request a School Growth Facilitated Board Retreat, contact your School Growth Associate or send an email to info@schoolgrowth.com.