Chambers hold Board retreats for a variety of reasons: to make a mission adjustment, to devise a one-year plan of work, to prepare for an internal reorganization, or perhaps to discuss and create policies. But to get the most out of your participants, it is important to thoroughly think through the event in advance. This article offers some ideas for creating a productive and efficient Board retreat.

BE CLEAR ON YOUR VISION

It may sound odd, but start at the end rather than the beginning. Having a clear picture of the results you need from your Board retreat will enable you to plan effectively. If you conduct a retreat every year, it may not have the same level of intensity from one year to the next. There is a marked difference between a Board retreat at which you are creating or re-creating your Chamber’s vision, mission and values versus one in which you are validating the strategic goals of your current strategic plan or planning your program of work for the next year. The precision with which you plan either type of Board retreat should be the same, however.

According to Jodi Ann LaFreniere, CCE, executive director of the Wake Forest (NC) Chamber of Commerce, “the amount of effort involved in planning the Board retreat has a direct correlation to the quality of the outcome.” By clearly defining the strategic direction of the retreat well in advance, you will ensure that you have all of the data and information needed to conduct an informed and comprehensive session. LaFreniere adds that “it is crucial to set the direction of the retreat with a clear agenda and buy-in from senior leadership.”

ENGAGE YOUR BOARD IN THE PLANNING

Where do you turn to get a clear vision of what your retreat needs to accomplish? You go to your Board, of course. The planning begins months before the retreat, when you ask the members of your Board what they hope to accomplish as Board members. Whether you ask them individually or collectively, their answers will provide the foundation for your strategic planning retreat. According to Dorothy White, president of the Kentucky Chamber of Commerce Executives (KCCE), “I have gotten some of the best ideas by asking my Board members why they are on the Board and what they hope to accomplish in their tenure.” She says that she “doesn’t take ‘I don’t know’ as an answer, either” and that “you have to push the limits with your Board to have them articulate their goals and objectives as a member of the Board.” By engaging Board members early on in the process of planning for the Board retreat, White believes you will get measurably better results during and after the retreat.

The bottom line is that while every Board of Directors has a unique and specific personality and set of goals for their Chamber, human beings are more likely to be engaged and stay engaged in the work they are undertaking if they have a hand in creating the goals and objectives for that work. Asking and listening to your Board members with respect to how they want to participate in and what they want to get out of a Board retreat is something that the Greater Seattle (WA) Chamber of Commerce has down to an art. Prior to conducting its last strategic planning meeting, the Chamber sent out a 10-question, online survey to each of the 114 Board members asking how the Chamber has been performing since the
last retreat and what its focus should be for the coming year. By doing this in advance and then bringing the compiled results to the Board retreat, staff was able to laser-focus the planning process. As Anne Maria Jacobsen, board administrator and special projects manager, puts it, “we’ve taken the ‘filler’ out of the planning process and are able to work within the availability and parameters of our large Board.” Emmy Jordan, the Greater Seattle Chamber’s vice president of member relations and business development, says her Board wants “convenience and to have their time used effectively.” She says that “having an engaged Board and active committees all year long allows us to streamline the strategic Board retreat to a more manageable level and increases participation in the Retreat itself.” Apparently the Board feels that this goal is being accomplished because its members remain highly engaged in the work of the Chamber.

ALLOW AMPLE TIME

Allocating the right amount of time to the retreat is a function of the vision and objectives of the retreat itself. If a Chamber needs to re-invent or re-brand, the strategic planning process will be considerably longer than for the Chamber seeking to validate its current program of work. In any case, the length of time allocated to the retreat needs to reflect the amount of time the Board can allocate to the event and be fully engaged. Many Board retreats include a “team-building” portion which may not be necessary for a Board that is meeting monthly, staying highly connected with each other and is comprised of very busy professionals. Really knowing and respecting your Board and having a clear vision for the Board retreat will allow you to determine the right amount of time to allocate for the event. The best strategy for team-building with a Board is to have ongoing opportunities for the members to get to know one another and not to try and accomplish a sense of team just once a year. The Greater Seattle Chamber has found that varying its meeting times and agenda throughout the year to include some social time is the best way to build relationships on the Board. In this way, Board members can “disengage from the actual agenda and focus on who the person is across the table,” according to Jacobsen.

SELECT AN APPROPRIATE FACILITATOR

Another component of an enticing, effective Board retreat is to choose the right facilitator. Some believe that an outside person should facilitate the retreat, but that is not necessarily so. An inside facilitator may be appropriate for Board retreats that are less intense in terms of the goals and agenda. The most important aspect of facilitation is that the role is one designed to help move the process of the Retreat along

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to the desired conclusion and is not necessarily an individual who is heavily influencing the direction of the outcome or the outcome itself.

However, your Chamber’s budget, your relationship with the Board and the vision for the retreat are key considerations in making a decision about how the retreat should be facilitated. If you decide to utilize an outside facilitator, it is important that you “develop a relationship with a facilitator whose approach and philosophy work for your organization,” says Wake Forest’s LaFreniere. An outside facilitator should be used for retreats that encompass issues which are more polarized or more complex. This individual has the opportunity to remain objective when personalities and emotions may run high. Additionally, an outside facilitator’s skill and experience may keep a meeting on track and ultimately more productive while allowing the chamber executive to maintain strong relationships with all Board members.

PROVIDE FRESH PERSPECTIVES AT THE RETREAT

A question that may not be asked often enough is, “Who should be involved in our Board retreat?” Many Boards and even chamber executives may not want to consider including “outsiders” in a Board retreat, but that may be a sign that this is precisely what should be done. The diversity of perspectives and opinions that may be introduced by including key staff members and key non-Board chamber members in the retreat could be the catalyst to producing a more robust and productive event. Remember, according to Sigmund Freud, the definition of insanity is doing exactly what you’ve always done but expecting different results! If you need to

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shake up your Chamber’s performance, consider including some new faces and voices in your retreat. The “voice of the customer” (i.e., your members) may be the very one you need to hear to more effectively plan for the future.

FOLLOW-UP IS CRITICAL

Every retreat should be completed with a set of goals that are measurable and meaningful. White, from the KCCE, observes that “if you don’t plan and you have no goal, that’s exactly where you’ll go—nowhere.” Follow-up from the retreat must be swift and specific. The old adage “strike while the iron is hot” applies here. After the event, the participants should be energized about the work they did and the work that is ahead of them, so you need to capitalize on that energy. Provide a full report of the results in no more than 10 working days, but make sure that you organize the results in a way that is motivating, not overwhelming. LaFreniere notes that after her Chamber’s last Board retreat, “several Board members were slightly overwhelmed with the sheer volume of work that we hoped to accomplish.” She and her staff members organized the strategies and objectives under four key goals and then assigned specific responsibilities to staff and Board members with projected dates for the work to be completed. By doing this, her Board was able to see that there was a clear process in place for how the new Strategic Plan would be executed.

Ultimately, the strength of your Board retreat depends entirely on the choices you make. Clarifying the goal, engaging the Board, choosing the right facilitator and participants, and setting “doable” tasks afterwards are important elements toward overall success. The overall results will be a direct result of the planning process, the Board’s engagement and the involvement of the facilitator. So, as you do with all of the momentous and memorable events your Chamber conducts, start with the end in mind and choose all of the elements with care.

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