



# **SAMPLE BOARD RETREAT AGENDA**

## PRE-RETREAT HOMEWORK

The most important purpose of the pre-retreat homework is to bring the group together in a deep and meaningful way. You want board members to really get to know each other.

One thing I have done is to create a Spotify playlist. Each board member submits 2 or 3 songs that lift them up, inspire them, or remind them of their cultural heritage. Someone agrees to compile them into a playlist, which you can use as background music during meals or for casual ice-breaker activities.

I also like shared readings that get board members thinking – either about the sector or the state of the organization. I'm a huge fan of *From Good to Great In The Social Sector*, by Jim Collins. It's more of a pamphlet – a quick and meaty read that helps board members consider the state of the organization.

But my absolute favorite pre-retreat homework is an [autobiography exercise](https://joangarry.com/ice-breakers-nonprofit-retreats), which you can read all about at <https://joangarry.com/ice-breakers-nonprofit-retreats>.

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## FRIDAY NIGHT

Please try to begin with a dinner. Make it as close to mandatory as you can. In fact, make sure the agenda indicates that the retreat starts with dinner on Friday.

The best dinners are multi-functional. They bring the group together informally AND they have some kind of programmatic element.

Here are a few examples:

- Invite clients to the dinner. Don't have your board members serve - this detaches them. Instead, ask them to sit and break bread with a client. Have the board member share his commitment to the org and ask the client to share her story.
- After a casual dinner, add a programmatic element over coffee and dessert. Perhaps it's the board of an organization advocating for LGBT families. Put together a nice panel of grown kids of LGBT families to tell their stories. This has tremendous power.
- During or after dinner is a great time to turn on the pre-compiled Spotify playlist. Give your guests the opportunity to guess whose songs are whose.

## SATURDAY MORNING

- WELCOMES and APPRECIATIONS and INTRODUCTIONS
    - Make the introductions count or build them into the next session
  - BUILD YOUR BOARD VILLAGE  
Whatever you do, don't call it an icebreaker!
    - Here's where you can share your autobiographies (see the pre-retreat homework above.)
    - If you have found an interesting reading, facilitate a 'book club'.
    - If you held a Friday night 'Meet the Client' session, have each member first introduce him or herself, and then do a bit improv. He or she then introduces him or herself as their client! This is a great way to bring the clients into the room, and the mission to life.
  - STATE OF THE ORG – "THE BIG THINGS"  
No lengthy presentation, but I would use PowerPoint. The Executive Director talks about the organization and the Board Chair talks about the board. This section provides context for the deeper discussion. Maybe you could frame it for each section as, "What Makes Us Good" and "What Will Make Us Great."
  - WORKING LUNCH WITH A CAMEO APPEARANCE  
Can you bring in a funder or a colleague from the sector? You want someone who can help the board understand the place the organization has in the sector and what s/he sees as trends, where you all fit in, and what challenges and opportunities are ahead. This could also be a panel.
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## SATURDAY AFTERNOON

- POST-LUNCH: THE DEEP DIVE  
As I mentioned in the post, there should be a central big topic to the day that has been framed by the work that has preceded the retreat. It should include the opportunity for small-group work if your board is big (but board and staff should work together). This must be crafted with great precision to ensure that you are getting authentic input and discussion.
- NOW WHAT?  
What you do AFTER the retreat is key. And so a quick wrap up with, "We'll get back to you with action items" doesn't cut it. Leave a lot of time for this.
  - o What are the next steps?
  - o Who will be responsible?
  - o What is the timing?
  - o How will we hold ourselves accountable?

This is where I often recommend a retreat “working group” that is designated to hold the leadership accountable to deliver on the action items – to keep the discussion alive and maintain momentum.

- **AROUND THE ROOM**  
What will each person take away from the day that will make him or her a better organizational leader? Just one thing.
- **EVALUATION**  
Leave 10-15 minutes for every single person to fill out an old-fashioned evaluation form.

Make sure that one of the questions includes the goals for the day that were set as a function of reaching out to every participant. Ask if the goals were met and for some color commentary around that.

Say these words to the group: *A number of folks spent a great deal of time putting this day together. Show them respect by offering more feedback than circling numbers. Please write down your thoughts. Take 10 minutes. It's what you can do to thank the organizers for all their hard work.*

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## **SATURDAY NIGHT**

- **SOCIAL TIME**  
This is where you learn if anything really “stuck” and where you can feel enthusiasm and excitement. I encourage you to build this into the day. If it is considered a formal part of the day, there will be an expectation of participation. You will also have fewer folks who bolt before the day is over. If your retreat is local, consider asking the board and staff to invite their significant others to join.

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Did I just hear you say, *“This is way too much to cover between 10 and 4?”*

You are absolutely right. If you are going to do a day-long retreat, it needs to be a **day long**. Start at 9 or 9:30 and end at 6pm. Then social time. Folks will only balk if the day is poorly planned, not well considered, and does not engage or enrich them.

An agenda like this will make it worth every minute. And folks will be informed, enriched and engaged. And when you inform, enrich, and engage, you **ignite** your ambassadors to invite folks to know more and do more.

For your organization, that would make it a very good day at the “office.”