



Board 101: Board Retreats Offer Time for Self-Assessment

BY PATTI KUNKLE

Successful college and university boards regularly analyze their actions to determine if they are on the best path to achieving their objectives. However, regular board meetings are often so tightly scheduled that they leave no time for self-assessment—both in terms of handling current issues and planning for the future.

Board retreats, then, provide the perfect setting for intense, reflective board work. They allow trustees to candidly review their own performance and set goals to strengthen their effectiveness. Such effectiveness lies in fostering a solid, mutually supportive relationship with the college or university president as well as among members of the board. Developing the trust and openness necessary to discuss critical issues requires time and consistent hard work. Retreats allow for such work to occur.

Some common topics for board retreats include:

- Board self-assessment, in which governing boards review their effectiveness and develop action plans to improve their organization and performance. This type of work often helps boards become more cohesive governing bodies.
- Board development, which comprises ongoing education and activities to recharge trustees' understanding of their governing roles and responsibilities. This activity is especially useful for orienting new board members, team building among members with mixed levels of experience, and developing new leadership.
- Work on strategic planning, mission, and vision, by which boards and presidents strategically align the board's work (meeting agendas, report formats, committee structure) to support the institution's strategic priorities. This often clarifies the board's responsibilities in the strategic planning process.
- Discussion of critical/controversial issues, through which boards and presidents can address difficult topics in open and candid forums. Often, a well-planned, inclusively designed and effectively facilitated retreat provides the best mechanism for challenging discussions, such as leadership transition (either the board's or the institution's), institutional crises, or trends in higher education that significantly affect the institution.

Board retreats provide the perfect setting for intense, reflective board work, allowing trustees to candidly review their own performance and set goals to strengthen their effectiveness.

A third party facilitator is fundamental to a retreat's success. Facilitators work with presidents, board chairs, and key personnel (such as other board or administrative officers and board professionals) to develop the agenda and program that best address the board's current needs and interests.

Retreats should be annual or biennial events, separate from regularly scheduled board meetings. Typically, retreats last one or two days, preferably somewhere off campus to give trustees space and privacy to freely socialize and discuss the issues that most concern them.

Retreats also require advance planning to optimize the use of the trustees' time and energies. AGB has a Board Professional Staff listserv, which allows individuals who support board activities to share ideas on how best to carry out their responsibilities. Information on planning successful retreats can be found at <http://agb.org/user-assets/BPNews/TipsNTricks.html>.

Successful retreats often end with reinvigorated boards, ones that are cohesive and have a renewed commitment to the institution's mission and purpose. They have clear visions of what their responsibilities are and what they need to accomplish and contribute to the continued work of strategic and integral leadership. Other potential outcomes are:

- Consensus on specific objectives to improve board organization, relationships with constituents, and performance;
- An improved relationship between the board and the chief executive, including clarification of mutual expectations, enhanced mutual support, and more effective communication;
- Increased productivity in board meetings; and
- Increased commitment to personal philanthropy and participation in fund-raising activities.

Board retreats are no longer "special sessions" that occur only when circumstances call for them. They should be viewed as a standing part of the annual board meeting schedule and an integral component to growing a more effective and strategic governing board.

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