

# What Not To Do During Your Next Summer Chapter Board Retreat



Most association chapters hold their board retreats in the summer. Typically, that's the best, and often the only, time they have to focus on chapter operations – there is just too much going on during a chapter year, between managing existing member engagement and planning and executing chapter events.



Can you remember anything specific about the last several chapter board retreats you attended? Hopefully they were productive, and everyone left with To Do items they could resolve before the chapter restarted in the fall.

Or were the outcomes of the retreats more like:

- Whatever happened to the notes from our whiteboard/flip chart?
- Why was there so much yelling?
- What was I supposed to do again?

To get the most out of a retreat and for your board members not to resent giving up one or two weekend days, board meetings require some strategic planning. When we say strategic, we mean you need to think about more than where you'll hold it, the food you'll serve and who will take notes, though those are also very important considerations and ones that should be included on your board retreat checklist.

No, we're talking about things like how the different sessions should flow, who needs to present and the overall goals of the meeting. And we're actually thinking about those things that you want to avoid during a board retreat. These are the things that would keep you from meeting the goals of the retreat, not to mention creating an uncomfortable situation for all attendees.

Here are five things to avoid at your next summer board retreat, for a retreat that is valuable and actionable. And memorable, but for all the right reasons.

## 5 easy ways to derail your summer board retreat

If you want your chapter board retreat to fail:

1. **Don't define success.** Sure, you can hold a meeting and hope it goes well. But how will the board know what does "goes well" look like? Until you define what success means related to your board retreat, like developing job descriptions for each board role or just making it through all items on the agenda and you thread that message throughout the meeting, your board meeting can't be a productive, successful one.
2. **Skip the icebreakers.** Yes, ice breakers can be uncomfortable and may seem like they take up time that could be better spent on the "more serious" items on your agenda. Why do you need to get to know each other, when most people already know each other? Even if you just have one new board member, take the time to give everyone a chance to interact with that person. Without that chance for some initial relationship building, that one person, and others, may not feel comfortable contributing to the meeting.
3. **Let your executive director (ED) create the agenda.** Having your ED create the agenda for your meeting is like having your treasurer do it. The agenda will have an angle that serves his or her purpose, which may or may not be what the board needs to focus on. Sure, the ED can create the first version of an agenda, but without input and review by the board, there's a chance the objectives the board wants to discuss won't be on the list.
4. **Don't discuss anything substantial.** Sure, you can spend your time discussing all the good things you did last year. But your board retreat could be doomed to failure, or at least not great success, if you don't take the time together to tackle important issues, like changes in your



industry, the need to adjust some of your chapter's services or the inability of your board to operate as a team.

5. **Don't have a facilitator.** Without one person taking the lead and ensuring the agenda flows and everything stays on track, you'll have way too many cooks in the proverbial kitchen. And we all know how that works out.

Avoid these five, to eliminate the risk of having days of discussion and then having no one remember what was discussed, decided and agreed to. Think about all the details, share your thoughts with the board and ask for feedback, so you're sure you're creating a board retreat agenda that's right for everyone. Do this, and no one will mind giving up a beautiful summer day or two to get down to real chapter business.

