



Investing In Your Vision: What Board Retreats Can Do For Your Organization

*"Your vision will come clear only when
you can look into your own heart.
Who looks outside dreams, who looks inside, awakes."*

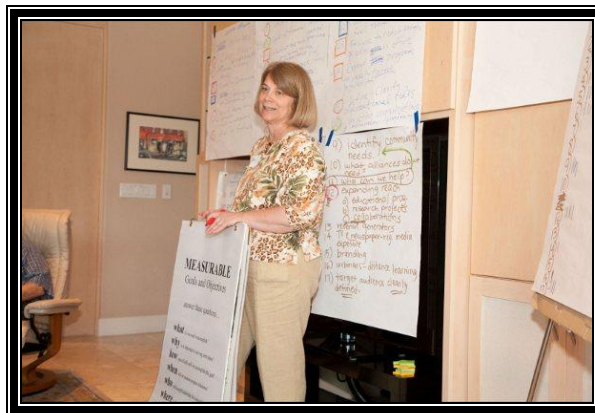
~ Carl Gustav Jung, Swiss Psychiatrist

So often, as we work toward fulfilling the mission of our organization, we forget the vision that will get us there.

We forget the forest, as we scrutinize the trees.

For an organization's Board of Directors, that's especially true.

That's why Board Retreats are vital to a nonprofit group's long-term success; they give the Board members an opportunity to look within their organization and identify long-term issues affecting the organization. This will also stimulate them to become more vested in the mission and in the vision of the organization.



Kathy MacNaughton Conducts Board Retreat

360 Degrees of Philanthropic Insight

The Board of Directors is charged with creating the vision for the organization and establishing a strategy to achieve that vision. They are the visionaries.

A friend of mine serves on a board, and noted that their membership had been declining over the past year. She shared her frustration with me, asking, **“Why are we not – as a board – looking at the underlying reasons our membership is down? How it is affecting the sustainability of our organization?”**

Those are valid questions to ask.

While the Board has the responsibility for assuring that the organization is accomplishing its current mission, it also must identify internal and external forces that will impact its future success. The board shouldn't be trying to solve those problems, but trying to identify the root causes – why something is happening. In my friend's example, I would counsel the board to charge the membership committee with learning why membership numbers have been declining, and then bring an action plan to the board.

That is the beauty of a board retreat; it focuses on the long-term sustainability of an organization.

“It is only when we silent the blaring sounds of our daily existence that we can finally hear the whispers of truth that life reveals to us, as it stands knocking on the doorsteps of our hearts.”

~ K.T. Jong

I recommend organizations hold a day-long board retreat once a year – off-site – as a chance to “get away,” to create an opportunity for bonding, networking and getting to know one another. We ask board members to give up one Saturday a year to focus on the vision of the organization – a small price to pay for the results. **Only when we have a chance to share common values can we excite and regenerate our organization, and really get a chance to see where it needs to be going.**

“The board members came away from our April board retreat feeling much more unified as a group, as well as giving them a clearer understanding of Inspire Community Fine Art Center's mission. It seems they all felt much more comfortable with their roles on the board.”

~ Susan Montagna, Executive Director, [Inspire Community Fine Art Center](#)

The retreat helped us gain a sense of history and an idea of where we want to be in the future. It was a great opportunity to get our board members oriented and "on the same page."

~ Maria Felix-Ortiz, PhD, Board President, Inspire Community Fine Art Center

I recently conducted another Board Retreat for [The Patient Institute](#), which helps patients and caregivers navigate the health care system. We had a full agenda, centered on clarifying PI's vision and long-term goals, and identifying the challenges, obstacles and resources needed to achieve that vision.

"We spent a great deal of time at the retreat re-wording our vision statement. This resulted in everyone understanding it much better, which made them far more excited about its possibilities."

~ Varda Ratner, Executive Director, Patient Institute

One of the goals of any board retreat is to give its members a chance to share their concerns and reach a consensus on the challenges the organization faces. Finding they have the same concerns as other Board members can also help bond the Board members and stimulate collective approaches to near and long term issues.

"... we really do fill a niche... we were able to clarify our target market and thereby focus our strategies. This was a big surprise for many who had been frustrated that our mission was too big."

~ Varda Ratner, Executive Director, Patient Institute

There's no getting around it: achieving a vision means active fundraising, which can be scary for some people who don't feel comfortable making the ask. A retreat is an opportunity to show board members how it's a "one step at a time" process, and how building sustained relationships is key to that process.

A retreat also can help members find their "target audience" for relationship-building activities. Rather than just ask board members, "Who do you know?" we help board members identify people who care about the mission, who may be interested and able to help sustain that mission. Developing those relationships not only strengthens the organization, but it helps focus on others who may be in a position to share their time, talent, treasure and influence with the organization in the future.

Over the years, I've learned that a strong nonprofit organization has a balance of programs, community awareness & recruitment activities and development & fundraising initiatives. Ideally, every activity has a primary purpose, but will also include components of the other two categories. Unfortunately, that isn't always the case. Board retreats can help all of the board members see if a year's worth of activities are balanced across the spectrum.

It wasn't all work and no play, though. During the board retreat for Patient Institute, we built in some fun, too. Not only was there time for the board members to visit amongst themselves, but towards the end of the day, we played "PI Jeopardy." Board members answered questions centered around the organization, its history, its vision and the programs and services it provides. The game was fun, but the underlying goal was to give them information about the organization they can use in telling the story of the Patient Institute to others in the community.

When you're able to share your personal reasons and experiences for supporting an organization, you become a much more effective advocate for the group.

A Board Retreat is an opportunity for self-discovery and a time to reassess the vision of an organization, so your work throughout the year can be focused on achieving the mission.

"Our executive director DOES have a dream, and we finally had the opportunity as a group to hear about it. It was important to have a time for planning. Additionally, Kathy did a great job with debriefing the retreat and providing us with some valuable tools."

~ Maria Felix-Ortiz, Board President, Inspire Community Fine Art Center

A primary objective of a board retreat is to get to know each other – and ourselves – asking questions:

- How long have you been on the board?
- How did you become a member of the board?
- Why are you a member of this board – what is your purpose?

A Board Retreat stimulates its members to question their answers, and many times, it rejuvenates their enthusiasm for the mission and sharpens their focus on the organization's vision. But, an organization can't have board members who are merely passionate, they have to bring a skill set to the table that doesn't allow their passions to cloud their judgement.

Serving on a board is an honor, but it also is a responsibility.

***“Your work is to discover your world
and then with all your heart give yourself to it. “***

~ Buddha
