

Philanthropy Corner – June 6, 2010
“Keeping Your Nonprofit Afloat Year Round”
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As hurricane season descends upon us this week, thoughts of effective planning and detailed preparation come to mind based on past memories and current storm projections. In the same manner that one would look to protect their livelihood in anticipation of a storm, nonprofit organizations should be using this time to convene a board retreat in order to be prepared for possible threats to the organization’s mission. Board retreats are the quintessential tool for organizations to identify strategies needed to survive factors affecting the ever-changing nonprofit sector. Below are some tips on how to organize an effective meeting in order to utilize the strengths of your board members and create an unparalleled opportunity for success.

Board retreats are one of the greatest instruments for nonprofits to achieve a new standard of performance and efficiency while serving as a rare opportunity to discuss the “big picture” rather than focusing on the business as usual conducted at ongoing board meetings. The purpose of a retreat is to set organizational goals for the upcoming year or longer, agree on resources necessary to execute the goals, set short-term and long-term goals, and identify a system to ensure plans are implemented. Planning a retreat should include scheduling it to occur outside of standard board meeting times, giving it an air of independence from the conventional gathering.

Unfortunately, nonprofit board members who have suffered through poorly designed retreats may have created and circulated opinions that board retreats are an exercise in ineffectiveness. Combating these pre-conceived and misguided notions can be difficult, but effective pre-planning and preparation can positively impact the experience and subsequent results. The key components of a well-run retreat are effective time management and generating impartial, yet meaningful discussion while creating levity and a positive environment, a role most often accomplished by hiring an outside facilitator to carefully choreograph the day. The role of the facilitator is to keep the meeting on track according to the agenda and facilitate achievement of the objectives. Having an impartial person who is not one of the management team or a board member can focus on the process of the meeting to allow participants to concentrate on the content.

Like any effective and efficient management meeting, a board retreat meeting is best accomplished in stages. Ample preparation should be employed and an agenda with accompanying information should be circulated prior to the meeting. Beginning the meeting can be awkward requiring an icebreaker to provide a level playing ground on which the group can familiarize themselves with new faces and names, while helping the group to bond and create a friendly environment. Regular board meetings rarely allow board members adequate time to get to know one another, so creating an environment for everyone to feel comfortable in participating in the retreat is essential.

Once the retreat is in full swing, it is important to keep to the agenda to ensure all agreed upon topics are covered. Despite more advanced forms of note taking using technology is available, flip charts are a great way for everyone to know that their voice has been heard and recorded publicly while cutting down on verbosity and repetitiveness. Use a S.W.O.T Analysis (Strengths, Weaknesses, Opportunities, Threats) to identify the internal and external factors affecting the organization as a tool to open discussion, followed by an analysis of the current goals and accomplishments.

The outcome of these discussions will lead to identifying new goals for your organization, as well as identify the resources needed to accomplish these goals. By clearly defining goals, both short and long term, you can begin to establish accountability strategies to demonstrate accomplishment. Knowing who will do what by when will allow the group to develop a singular, concise plan of action. Providing a written copy of what was agreed upon at the meeting is the best way to establish accountability; thus, it is important to provide written minutes in a timely fashion to ensure the successful outcome of the retreat. The agreed upon goals and strategies should be reviewed regularly so that everyone can share in the collective responsibility of determining progress or if revision is needed.

All in all, a well-planned, effectively executed retreat is perhaps the best way to address head-on some of the more challenging issues facing a board and the organization it oversees. And like any seasoned veteran of our Island's changeable weather should know, looking to new and improved strategies are key to keeping afloat.

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