



## GOVERNANCE

### Information: The Key to Retreats That Flourish

Board retreats provide a constructive vehicle for creating clear strategy for an association and building commitment.

Yet, as one association executive observes, all too often board planning retreats "flounder and fail." What can associations do to make retreats a more productive planning process?

One valuable strategy involves collecting key information from all stakeholders prior to the retreat using three methods: interviews, focus groups, and surveys. Data are then analyzed, organized, and presented at the retreat to serve as the basis for discussions and decision making.

Many associations hire a consultant to perform this work. Those that opt to assign a staff person should select someone who is objective; understands strategy; and demonstrates competencies in interviewing, analyzing information, creating presentations, facilitating discussion, and achieving group consensus.

**Interviews.** Confidential interviews, with the chief staff executive and board leaders, can net answers to myriad questions concerning the organization's core culture, internal and external factors that affect the organization, and future direction. For example,

- What words would you use to describe the association?
- What makes the association different, special, or distinctive from other organizations doing similar work?
- How would you like to see the association in the next three to five years?

- To achieve that desired future, what changes do you recommend in the association's internal workings, programs and services, and board activities?

**Focus groups.** These sessions broadly address organizational culture issues to build participants' feelings of commitment to the association. However, most of the time is targeted to specific topics that emerge from interviews and that relate to the particular knowledge or expertise of the group. For example, one medical association seeking to increase membership and participation used focus groups of doctors to explore ways to improve recruitment and to evaluate membership programs and services.

**Surveys.** Remaining participants complete a one-to-two-page survey composed of items that surface from the interviews and focus groups.

All information is then consolidated and analyzed using qualitative and quantitative research techniques. Data are coded by topic, clustered by broader categories, and organized under three major groups: core culture, internal and external environmental analysis, and future direction. The final product includes a presentation, in both PowerPoint and hard copy, with a core culture map and strategic action plan chart.

Collecting information prior to a board retreat promotes broad participation and strategic thinking. This process saves time during the retreat and produces structured content to guide discussion. Participants arrive with a clear focus and leave with a sense of accomplishment and commitment to a defined strategy.

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