

Board Retreats



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Retreats have long been recognized as a special time for board members, superintendents, and administrative teams to intentionally separate themselves to spend time reviewing strategic planning purposes, a review of both long and short-term initiatives, reviewing enrollment projections, projecting the impact of particular legislation, staffing and financial needs throughout the corporation, reviews of board and corporation goals, superintendent evaluation reviews, and board training and reviews. That's a long list of possible topics, but it is by no means all-inclusive

Unfortunately, many boards neglect the benefit that setting aside a specific time when they can be particularly focused on these types of discussions or information-sharing. It is true, years ago, a primary benefit to the retreat setting was being away from work, phones and other interruptions and going on a retreat helped ensure that you would be disengaged from day-to-day events that so often interfered with more in-depth discussions. Of course, in today's technological environment, that is not as easily accomplished. However, I still recommend retreats for more in-depth conversations not easily facilitated as part of a regular meeting agenda.

If you are planning a retreat, or you think you might want to consider that option, your planning needs to include some basic rules:

- **The retreat, whether on-site or remote, must be advertised as an open meeting**, except for any portions of the meeting that include employee evaluations, or other permissible executive session items, such as planning negotiation strategies or reviewing active or pending litigation, etc. Those would have to be advertised as a separate executive session but could be included as a separate meeting at some point during the retreat.
- **Make sure you have access to all technology required** for your presentations, discussions, or the requirements of any guest presenters. Do not take it for granted that every location will be able to meet your requirements. Also, check for any upcharges for providing technology needs.
- **Have a cell-phone protocol** that everyone adheres to and make it clear that everyone needs to follow the rule! Keep your phones on silent, or vibration, and take or return calls during breaks or at mealtimes, not during your meeting time.
- **Create and follow an agenda**. That may seem restrictive, but without a schedule and the discipline to follow it, it is too easy to veer off script and into discussions you are not prepared to have. You may find that discussions you want to have will make excellent agenda items for another retreat.
- **Use laptops and other devices for the work at hand**, not to surf the web or stay caught up on email

The primary reason to schedule a retreat is to have everyone's undivided attention. Obviously, these meetings are best when every board member can commit to attending and staying engaged. It takes a significant amount of planning to ensure that a retreat has every opportunity to accomplish its objectives, but it is a wonderful opportunity to plan, review, and engage in meaningful conversation on topics that do not lend themselves to the regular meeting format.