

Retreating to the Future

by Janet M. Bailey

The past few years have not been kind to nonprofit arts and cultural organizations. As one Artistic Director recently remarked, “Our board and staff meetings aren’t focused anymore on whether or not to take a risk on an interesting program ... they’re about whether we can even make the next payroll.”

It seems, however, that there are glimmers of hope on the horizon. General economic trends are still not exactly robust, but they certainly have bottomed out and are starting to recover. The stock market – always a leading indicator of economic activity – is up smartly in 2003. Optimism is in the air, and those organizations that have made it through the last three years are starting to think about moving forward once again.

But where to go? The last three years for many arts organizations have been marked by reductions in programs, staff cuts, cost containment measures – in short, actions aimed at simply ensuring survival. Now, organizations need to prepare themselves to take advantage of an improving environment: to restore programs that were cut or postponed, to revive plans for major fundraising campaigns, to undertake some of the exciting but riskier new initiatives that were put on hold when times were tough.

A Board retreat can address these questions, and serve other purposes as well

These kinds of big-picture questions usually cannot be handled effectively through regular Board meetings. Members arrive in a rush, directly from their offices, having put in little advance preparation. The meetings themselves are – quite appropriately – taken up with financial and programming matters over which the Board has on-going oversight responsibility.

Faced with the need to set aside some concentrated time for looking at broader questions, many organizations’

leaders think about scheduling a full-day, off-site Board retreat.

A Board retreat is an excellent vehicle for dealing with complex problems and mapping a course of future action. Superior solutions occur when a range

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of ideas representing multiple points of view are brought to bear on the discussion, even if the process itself is somewhat messy. Moreover, moving forward works best when everyone is pushing in the same direction, and there’s no better way to get people focused on a common goal than to involve them in developing the plan for getting there.

A Board retreat can also serve an important educational function. Board members need to understand the economics of arts organizations in general and their own organization in particular. This educational function is especially crucial now, to provide context for analyzing the experiences of the past few years – that is, to help the

leaders understand where the organization has been so they can make informed decisions about where it should be going.

Finally, an all-day retreat is an invaluable tool of team-building, even if the session is not specifically designed or presented to participants as a team-building exercise. Joint problem-solving builds respect, understanding, and good working relationships – elements that are critical to good Board functioning in the long run.

A retreat can be part of a larger process or can focus on a single issue

Board retreats generally fall into one of three categories, dealing with external issues of strategy and tactics or with internal governance matters.

A **strategic planning process** tackles major questions of mission and strategy – issues that are at the very foundation of the organization’s existence. Such an initiative can take place over many months and involve multiple sessions with a planning committee, meetings with the full Board, and extensive data gathering and analysis as a basis for decision-making. Strategic planning sessions are essential for organizations that are dealing with significant change, such as the need to rethink an outdated mission or to plan for new artistic leadership. But all organizations can benefit from a periodic review of their strategic plans, particularly at the current juncture.

A **tactical planning retreat** is used to craft specific plans in functional areas such as marketing or development. Although the objectives may be more

tactical and the process more modest, these sessions do not have to be boring or mundane. On the contrary: assembling a diverse group of smart people to brainstorm new approaches to old issues can be a highly productive exercise. Again, at the current juncture, most organizations would be well-served by an initiative – perhaps involving both Board and staff members – aimed at setting priorities and building plans in functional areas that will be responsive to a new and healthier external environment.

Finally, a *Board and governance initiative* can be extremely useful for addressing issues related to the composition and procedures of the Board itself. Though some may be fearful that such sessions will devolve into time-wasting “touchy feely” exercises, this type of session can in fact deal with a variety of Board and governance issues, some very concrete. Participants can map out plans for Board expansion, evaluate and refine the committee structure, address leadership and succession planning – and, yes, promote teamwork and a sense of belonging, particularly with newer members.

Five planning pointers will ensure an effective session

Most members of nonprofit Boards have extensive backgrounds in business, government, or academia – which means that over the course of their careers they have undoubtedly sat through hundreds of boring and unproductive meetings. To signal that this session will not be one of those, organizers should keep five pointers in mind.

1. Gather and disseminate information in advance. Meetings often fall into one of two camps: those that start out with nothing more than a blank piece of paper and everyone’s own set of preconceived notions, and those that use up valuable meeting

time with presentations of facts and figures that just as easily could have been sent out in advance. Pre-meeting information can involve pulling together existing historical trends and budgets, collecting new information through surveys or numerical analysis, or simply sending out some provocative books or articles to inspire people’s thinking and spark debate.

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2. Be clear about objectives and outputs. Participants should understand clearly what issues will be under discussion and what they are expected to contribute both during and after the meeting. If there will be multiple sessions involved, as there often are, participants need to understand in advance the commitment that is being asked of them. Organizers should think through what they can reasonably expect to accomplish within a one-day session, and manage participant expectations accordingly.

3. Select an outside professional who has experience with the nonprofit world to guide the process. A skilled outside professional is always essential to provide structure, impartiality, and a cool head, and to free up the Board leader to participate in discussions. Beyond this, an effective facilitator will have an understanding of the unique nature of nonprofit organizations, so that he or she can guide the discussion productively and not simply record the proceedings.

4. Get the details right. Organizers need to set aside enough time for wide-ranging discussion, but not so much time that energy levels flag before the session is over. A location away from daily distractions is critical, and a living room type setting can be a pleasant alternative to a standard conference room set-up. Starting and ending sessions on time will earn the appreciation of participants and distinguish this session from other, less-disciplined sessions that participants have had to endure in the past.

5. Conclude with assignment of tasks and timetables. Nothing focuses attention as effectively as seeing one’s own name and a deadline written on a blackboard. A clear plan of tasks and timetables also signals to the entire group that the meeting has not been an empty exercise, and that actual results are expected. Then, it is important to follow up the meeting with something in writing and at least one additional session where participants report back on their assignments.

An important responsibility

Arts and cultural organizations are a vital part of our lives and communities, and their leaders have an important responsibility to see that these institutions not only survive the bad times but flourish in the good times. Thankfully, it appears that the gloom and doom of the past three years is at last giving way to hopefulness about the future, and astute Boards will seize the opportunity now to prepare for better times ahead. ❖

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