



Strategic
Leadership **WINGS**
Conference



Facilitating a Board Retreat

Wendy Dant Chesser

October 25, 2023

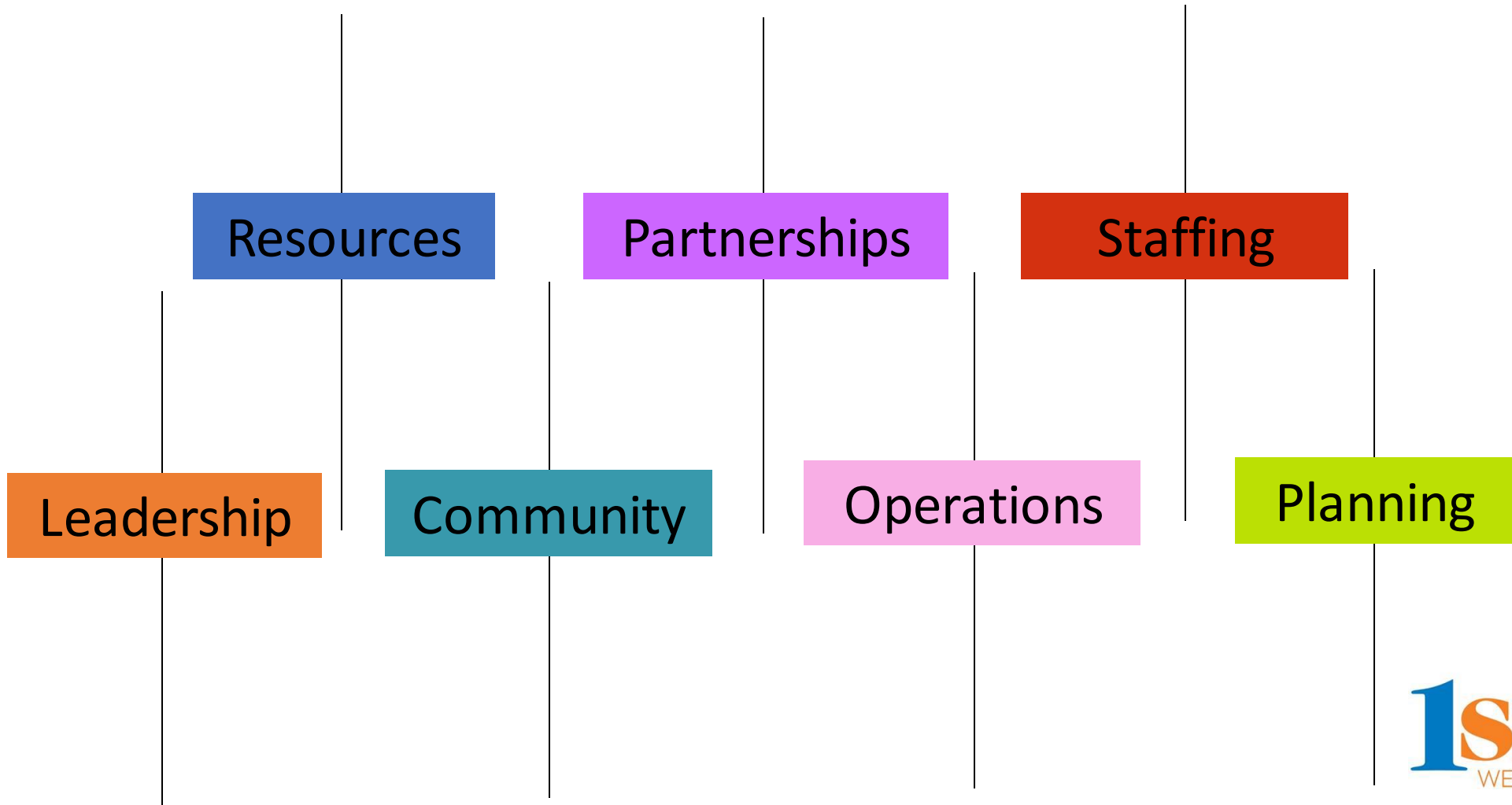
Henry Ford . . .

**Coming together is the beginning.
Keeping together is progress.
Working together is success.**

What Are We Doing?



It All Must Work Together . . .



Engage Your Board

- To keep momentum for long-term projects
- To combat burn-out of present leaders
- To ensure a constant supply of trained leaders
- More responsibility is being shifted to local organizations
- To combat the “brain drain” within your organization

Board of Directors Retreat

- Be prepared!
- Agenda and Objectives
- Set Ground rules
- Involve Everyone
- Stay on time
- Next steps/action steps – review at the end

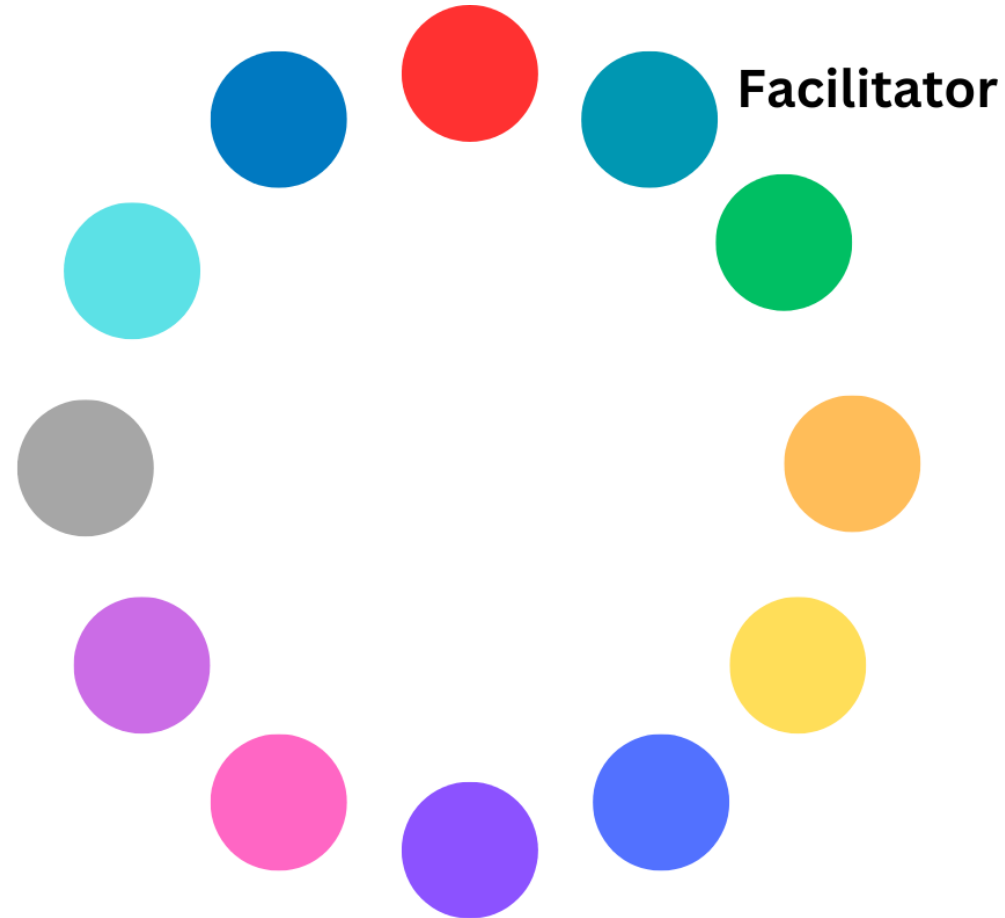
Expectations of Board Retreat

- Organizational Purpose
 - Who are we? Why does or organization exist?
- Clarity
 - What are we going to do? Which specific items we will achieve?
 - How are we going to approach our work?
- Timing
 - When will we get things done?
 - How long will this plan last?
- Adaptations
 - What may not go as planned?
 - How do we adjust to the hurdles?

Board Retreat Roles and Responsibilities

- Participants
- Experts
- Staff
- Timekeeper
- Facilitator

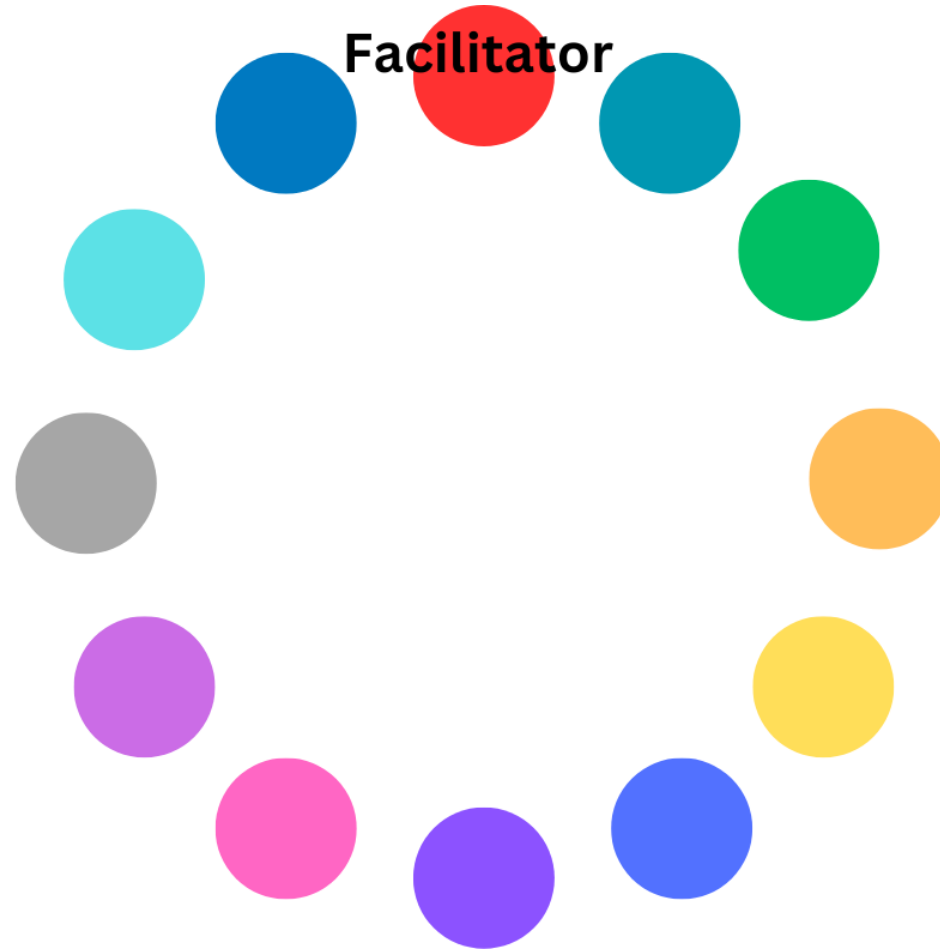
Outside Facilitator



Staff Facilitator



Leader Facilitator



The Jobs of a Retreat Facilitator

- Skilled facilitator – Allows for a group to gain consensus around complex topics efficiently
- Consensus – Finding an *acceptable proposal* that **ALL** members can *support*.
- Help your Board Get Stuff Done
 - What they should do and how to collaborate to do it
 - Overcome *Collaboration Chaos*
 - Groups of people do not naturally work well together
 - Meetings Generally Suck

Essential Skills Needed by Facilitator

Embrace the facilitation mindset

1. Be the guide, not the hero

- Active listening
- Uncover the groups' best idea, not your own

2. Time Management

- Work does not start or end with the workshop – be prepared
- Planning the workshop so its not overwhelming to you or the group

Essential Skills Needed by Facilitator

Embrace the facilitation mindset

3. Shortcut circular discussions

- Arguments which go on almost endlessly, repeating the same patterns with no resolution
- Allow the group to move along
 - Use a Parking lot – Holding spot for items that are off topic or where emotions are driving
 - Infinity Voting – Give participants an opportunity to vote on most important areas
 - Just Start Writing – Its easier for people to agree/disagree with your statements than to come up with their own

Essential Skills Needed by Facilitator

Embrace the facilitation mindset

4. Keep Energy levels consistently high

- Give participants break time

5. Effectively curbing team politics and group think

- Individual exercises help to keep people from grouping
- Gives everyone an equal voice in the discussion

6. Dealing with Troublemakers

- Turn their energy around
- Don't ignore them

Essential Skills Needed by Facilitator

Embrace the facilitation mindset

7. Give clear instructions

- Sounds simple, but . . .
 - Don't assume they all know as much as you do
 - Give them the What-Why-How for the exercise
 - “How might we” questions

8. Be ready to adapt!

- Expect the unexpected
- Remote options?

8 Roles of a Facilitator



Guide

The facilitator must know the steps of the process from beginning to end and must carefully guide the participants through each phase.



Bridge Builder

Where other people see differences, the facilitator must find and use similarities to build bridges to consensus.



Praiser

At every opportunity, the facilitator should praise the effort put forth, the progress made, and the results achieved. Praise well, praise often, praise specifically.



Taskmaster

The facilitator is ultimately responsible for keeping the session on track. This means tactfully cutting short irrelevant discussions, preventing detours, and maintaining a consistent level of detail throughout the session.



Motivator

From the rousing opening statement to the closing words of cheer, the facilitator must ignite a fire within the group and keep it well lit. The facilitator must establish momentum and keep the pace.



Clairvoyant

Throughout the session, the facilitator must watch carefully for potential signs of strain, weariness, aggravation, and disempowerment - and respond in advance to avoid dysfunctional behavior.



Peacemaker

While it is almost always better to avoid a direct confrontation between participants, should one occur, the facilitator must quickly step in, re-establish order, and direct the group toward a constructive resolution.



Active Listener

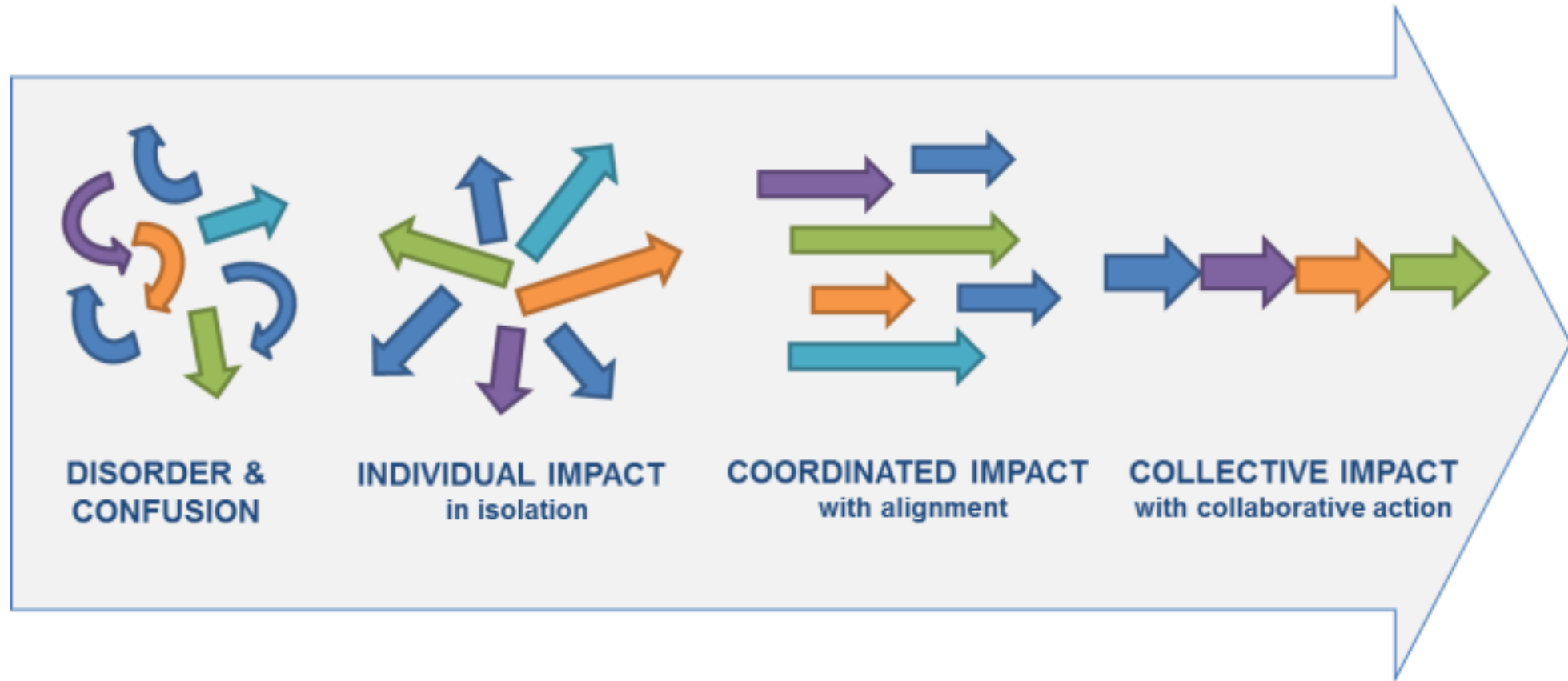
At every opportunity, the facilitator must make a conscious effort to hear and understand the content, intent, meaning, and feeling of what is said.

Leadership
Strategies
Level up.

Elements of Facilitation

- Preparation and Process Design
- Create the right space for discussion
- Lead the process and know when to change course
- Ensure that everyone is given an opportunity to speak and be heard
- Ask great questions
- Achieve outcomes through discussion

Building a System for Collective Impact



Thank you!

