

Bringing **clarity** and
certitude to philanthropy

Tips for a Successful Board Retreat

VISIONARY

Tips for a Successful Board Retreat



Jill Marsteller



Tom Tritton

CALICO
(Creative Advisors Looking to Improve Charitable Organizations)

Why?

- Have a clear re ason that is NOT “Business as Usual”
- Examples: Strategic Planning, Campaign Planning, shift in financial focus of model, Governance

When & Where?

- Seasonally timed/off typical board schedule
- Give a lot of advance notice
- An off -site location —fresh scenery=fresh ideas

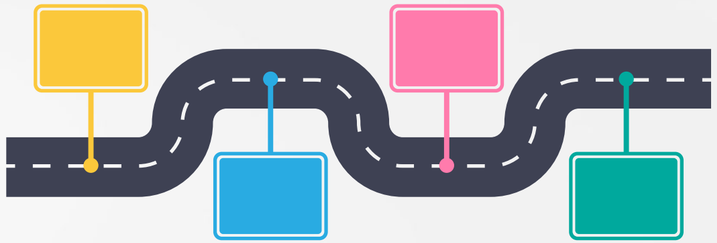


HOW?: Before



- Secure an outside facilitator who can be objective and keep the discussions moving
- Send a clear and crisp agenda and all reading materials in advance
- State the desired objective of the retreat upfront in the agenda; be sure staff and board leadership are aligned!
- Limit group sessions on the agenda to 2 or 3; allow time for breakout groups and hallway conversations
- Plan for social time to create synergistic bonds and positive offline conversations

HOW?: During



- STICK TO YOUR TIMELINE! Keep agenda moving
- Be sure everyone knows the objective of the retreat
- Do not allow agenda to be “hijacked” —if needed, have a “parking lot” for unwieldy or unrelated ideas to be sequestered
- Stay focused on the future; don’t rehash the past
- End with action plan for stated objectives, with responsibilities and timelines attached to each target

HOW?: After



- Send follow up notes and calendar around action steps
- Build time into future board meetings for “check ins” around objectives and timelines from retreat
- Decide if and when Parking Lot concepts will be revisited
- Reinforce the positives from the retreat, so people feel good about not just this one but the next one

QUESTIONS???



Contact Us:

calicoint.com

jmarsteller@calicoint.com

215-913-5671

Thank You!

For information on board retreats, or strategic planning contact:



Scott Lange
scott@visionaryphilanthropy.com
Jill Marsteller
jmarsteller@calicointinc.com

VISIONARY

Copyright July 2026

THE Giving Institute™ MEMBER
Shared intelligence. For the greater good.