



## SORKIN CENTER RETREAT FACILITATION

### Overview

A Board Retreat provides a unique opportunity for a nonprofit board to come together for a specific purpose. Whether the focus is to unite the team, think strategically, plan for the future, or address critical issues or opportunities, a retreat can bring your board closer together in working to support the nonprofit's mission. While board members, the Executive Director, and staff give extra time, ideas and energy to the event, an outside facilitator can help maximize the productivity and effectiveness of a retreat. A facilitator also allows board leaders and staff to fully participate in the retreat, because they aren't managing the day itself.

Sorkin's Retreat Facilitators work with a nonprofit's Executive Director and Board Chair through the entire retreat process: designing and planning the retreat, guiding and facilitating the event, and recording and summarizing discussions, decisions and next steps.

### Planning and Designing

Advance planning is key to a successful Board Retreat. Sorkin Facilitators typically spend two to three hours planning for every hour of the retreat. Planning steps include:

- Identifying the purpose and timing of the retreat by considering why to have a retreat and why now
- Identifying the issues most pressing to the organization
- Understanding the desired outcome by asking what should be different after the retreat
- Setting the day's objectives and goals, and determining what success looks like
- Thinking about the participants, board and organization culture, and board dynamics
- Building a realistic agenda
- Designing a process to achieve the day's goals
- Identifying what materials are needed
- Organizing and implementing any pre-work required of board members, such as surveys or other tasks
- Anticipating any challenges

### Facilitating

The role of the Facilitator will be determined during the planning phase, depending on the preference of the organization's leaders. The facilitator may run the retreat, lead specific segments, or guide discussions and play a supporting role throughout the day. Responsibilities may include:

- Setting expectations and establishing ground rules
- Reviewing the agenda and goals
- Leading icebreakers and team building exercises
- Clarifying instructions
- Keeping the meeting focused and on track
- Fostering participation and ensuring contributions are heard and considered
- Asking probing questions
- Providing a fresh perspective
- Managing group conflict
- Working toward buy-in from the group
- Ensuring the board reaches clear and actionable decisions
- Identifying and achieving desired outcomes

### Recording and Follow-up

The Facilitator will document discussions, ideas, questions and decisions throughout the retreat. The outcomes, action items, ownership, and next steps will be recorded. Following the retreat, the Facilitator will provide a report for board leadership that documents actions of the day as well as next steps. Additionally, an evaluation of the event can be sent to participants and findings shared with board leadership.

### Contact The Sorkin Center

For more information about Retreat Facilitation, including pricing and scheduling, please contact Wendy Gualtieri at (202) 280-1761 or [wgualtieri@compassdc.org](mailto:wgualtieri@compassdc.org).

### About the Sorkin Center at Compass

As part of Compass, the Sorkin Center builds on Compass' years of experience and expertise in the local nonprofit sector. The Sorkin Center provides services to nonprofit boards, including trainings, facilitation, and strategic planning consulting. In addition, Sorkin's Corporate Services support employees serving on boards or those interesting in exploring board service. The Sorkin Center also partners with foundations to provide board member matching, as well as support and training for nonprofit boards within a foundation's grantee portfolio.