

## Planning a Successful Board Retreat

### Why Host a Retreat?

- Sets the tone, expectations, and vision for the year.
- Builds trust, cohesiveness, and social support.
- Prepares the team with strong bonds to proactively prevent future conflict.

### Phase 1: Logistics

- **Format & Location:** Survey your board to see if they prefer an in-person, virtual, or hybrid retreat. *Note: Hybrid formats can be difficult to manage and participate in without proper equipment, like a projector, a good microphone, and a speaker.* If in-person, choose a casual location away from the school (e.g., backyard, living room, library, or restaurant).
- **Timing:** Schedule early, ideally holding the retreat before mid-August, so there is time for action items before school starts. Aim for a minimum of 2 to 4 hours. *Tip: Consider using a poll to find a date that maximizes attendance. Note: Be mindful of energy levels, so attendees do not shut down; if virtual, explicitly include time for "bio-breaks" and stretching.*

### Phase 2: Retreat Preparation

- **Principal Input:** The president should meet with the principal beforehand to align on goals and school dates.
- **Pre-Retreat Survey:** Ask the board for their input to help build the agenda (e.g., "This retreat will be successful for our PTA if...") and collect their preferred contact information and emergency contacts.
- **Pre-Retreat Materials:** Send materials in advance and communicate expectations.
  - **For Reference:** Board member contact sheet (compiled from the survey so everyone can easily reach each other).
  - **For Review:** Draft meeting agenda, Board *Code of Conduct*, draft calendar (be sure to consult a cultural holiday calendar, school, and district schedules), budget, financial statements, and standing rules.

### Phase 3: At the Board Retreat

- **Team Building:** Provide name tags and begin with an icebreaker. If in-person, provide snacks; if virtual, consider an online game.
- **Establish Norms:** Agree on and sign the Board Code of Conduct to establish how the team will work together (e.g., assume good intentions, and ensure new members have an equal opportunity to speak).
- **Review the Foundation:** Discuss past activities, individual duties, and vote to reapprove the PTA mission.
- **The Core Business:** Review, discuss, and update the budget and the standing rules. *Pro-Tip: The retreat serves as your first official board meeting, so quorum must be met. Unlike a General Membership Meeting (GMM), you DO lose quorum at a board meeting if people leave, so be sure to conduct business early if someone must leave early!*
- **Master Calendar:** Finalize meeting dates, programs, and events as best as possible.
- **Goal Setting:** Evaluate what is working well, identify areas for growth, and vote to establish actionable goals for the year. *Note: Returning members can provide historical context, while new members can offer valuable, fresh perspectives on what to improve.*

### Phase 4: After the Retreat

- Publish the final calendar and submit facility use requests.
- Distribute meeting notes and action items promptly.
- Schedule check-ins with board members throughout the year.