

## The Cause Effective Board Retreat: Clarity, Purpose and Inspiration

Cause Effective can help you plan and run a retreat to bring new energy and purpose to your board team. We do more than facilitate your meeting. Together, we can create a retreat which puts your board on the right course to:

- Grow the next generation of board leaders and fully integrate new board members onto the team
- Rekindle the passion for your mission and turn that passion into action
- Make the connections between mission, strategies, and budget that will energize all board members to fundraise with confidence and skill
- Identify new approaches to prospects within board members' networks, freeing them from fundraising from just the same people year after year
- Define responsibilities so that board members govern rather than manage, and fundraise with imagination and energy
- Design board meetings which focus on deliberation, decision-making and outcomes
- Identify and build consensus around board-level priorities and devise annual workplans for each committee – and even action plans for individual board members – that drive towards fresh new outcomes

### A Successful Day Grows From Planning

Weeks before the retreat, we gain board buy-in by fostering discussion among board members on key topics and goals, identifying what needs to change so your board can move forward. Working, to the degree possible, through a retreat task force or planning committee allows us to build in a core principle of governance: peers are best motivated and led by peers. And we add social bonding and team-building with a taste of mission into every retreat.

### Board Members Exercise Leadership

Cause Effective-led retreats include a significant place for board members to exchange ideas with one another during the retreat, modeling the character of highly-functional boards. For instance, board committees might each prepare some key questions to be considered by the board as a whole. We know board members are busy people: our role, together with senior staff, is to ensure that the planning group's time is well used and focused.

### Strengthening Commitment and Skills to Govern and Fundraise

Beyond helping board members define and speak to their own issues, Cause Effective can provide essential skill-building in governance and fundraising practices rooted in the busy, over-scheduled world that today's board members inhabit. We draw upon nearly 35 years serving as thought partners to NYC's nonprofit community, resulting in board recruitment that brings you the candidates you need, board meetings that result in substantive and rewarding deliberation, and board members emboldened to unlock donations from within their networks.

Our clients find our interactive style of training helps board members previously reluctant to fundraise to tap their passion for mission and become confident and skilled askers.

### A Springboard to Further Action

Cause Effective retreats lay the foundation for the day after, when the hard work truly begins – by focusing on board members recognizing their unique role in advancing their organization's public profile, community of support, and sustainability. Committee charges are re-affirmed and tied to annual, realistic workplans. Individual board members leave having accepted personal assignments and often with a draft of a personal, year-round fundraising plan.

Our packages, for half-day and full-day retreats, include time for planning, retreat facilitation, and one or more follow-up sessions to ensure the commitments made have the best chance to be fulfilled. Our fees run from \$2,500 to \$6,000, varying based on timing and scope. For more information, please contact [consulting@causeeffective.org](mailto:consulting@causeeffective.org).