

Retreat to Move Forward

When you hire a new superintendent, holding an intensive, focused daylong meeting with the board and top administrators can set you on the right path

S ■ Dallas Dance, the new superintendent of Maryland's Baltimore County Public Schools, is one of the youngest CEOs of a large district in the U.S. At age 31, he is tasked with running a system that has 105,000 students, 17,000 employees, and a \$1.5 billion budget.

Dance started July 1, but several weeks before he came on board, board President Lawrence E. Schmidt approached him about holding an intensive daylong retreat to ensure a close and productive board-superintendent working relationship. This "strategic work session," which was held on July 14 and involved the board, Dance, and his executive team, was considered an unqualified success.

"I couldn't have been happier at what we accomplished in only a day together," Dance says. "Not only did the event energize participants, we also generated a mountain of really practical ideas for building a rock-solid board-superintendent partnership that could withstand the inevitable stresses and strains at the top of a huge, complex educational enterprise. And we even went on to identify several ways to strengthen the board's governing capacity."

I recently talked at length with Schmidt and Dance about what they felt made the session such a winner. In

their eyes, five key elements emerged.

1. A meticulous design process

Involving four of the board's 12 members in designing the session was critical, both said, because it gave credibility to the process and built board ownership. The design process also benefited from the board members' experience and expertise.

"The last thing we wanted to do," Schmidt says, "was just bring in an outside facilitator who would take us through his or her boilerplate retreat 'package.'" I was retained to help plan and facilitate the session. I interviewed the members one-on-one via telephone. Then, in a long teleconference, the committee worked out all of the important details, which included:

- Determining the session's objectives, including, for example, "to identify and explore opportunities to strengthen board governing capacity through improvements in the board's governing structure and processes."

- Establishing the session's structure. The committee decided to use six breakout groups led by board members to generate content and ensure active participation.

- Fleshing out the blow-by-blow agenda.

A seven-page session description was sent out in advance to all partici-

pants. The committee members were listed by name, signaling that the day would be the very opposite of a "canned" or slipshod event. Everyone involved knew well in advance that the day would be worth their time and energy.

"Some of my executives were a bit skeptical at first, since they'd been through a few disappointing retreats," Dance says, "but when they saw the detailed description, they realized that July 14 wouldn't be 'same old, same old.'"

2. Strong board leadership

In interviews with the design committee, several board members said they felt "led by the nose" all too often by the previous administration. They also said they were fed up with what they considered too many "show and tell" board meetings.

Strong board leadership was built into the July 14 session, principally by creating the six breakout groups led by board members. Three groups met concurrently in each of two rounds over the course of the day together.

The three groups in the first round focused on the board-superintendent partnership, for example, identifying superintendent "CEO-specific" leadership targets in the areas of internal educational leadership and management and external relations. The second-round groups examined facets of the board's governing work, including identifying governing performance targets and guidelines for working together.

"Getting several board members involved in leading—indeed, co-facilitating—the July 14 session," Schmidt

says, “further strengthened board ownership of the session, but we had to make sure every one of our breakout group leaders succeeded in the role.”

I was asked to develop a set of breakout group leader guidelines. For example, the guidelines noted that the leaders’ primary role was to encourage active participation of breakout group members. Orientation teleconferences were held for the leaders a week before the session.

3. Executive team involvement

The committee that designed the strategic work session concurred that all of the superintendent’s senior executives should be present and actively participate in the event.

“There were three really compelling reasons to include all of my executive team members as active participants,” Dance says. “One, our breakout group deliberations would benefit from their in-depth knowledge and technical expertise. Two, their participation would break down board-staff barriers and help us meld together as a more cohesive ‘strategic governing team’ for the district. And three, they’d be much

better prepared to carry the ball in implementing recommendations coming out of the retreat.”

4. Clear follow-through plan

From the start, it was made clear that action would be taken down the pike. The work session description sent in advance to the board and the administrative team outlined the follow-through process.

“We wanted everyone to know that all the time and energy they’d be putting into the July 14 work session would generate concrete results, and all the good ideas and questions that came out of the session wouldn’t be written in sand,” Schmidt says.

Before arriving at the meeting room, all participants knew that the breakout group flip chart sheets would be transcribed at district headquarters, that I would write a follow-through action report, and that the committee that designed the work session would review the report and present it to the full board.

5. Professional facilitation

The district, knowing the complexities

facing Baltimore County and the stakes involved, recognized that professional facilitation was also part of the equation. That’s one reason they opted to hire a consultant to assist in designing and facilitating the session.

“Pulling together the board and senior executives of the 26th-largest school district in the country was, by definition, a high-stakes affair,” Dance says, “and we had to make sure the session wasn’t just well-designed, but that it was also really capably facilitated.”

Districts that embark on this type of process should consider these five keys to holding a successful retreat, whether you hire someone from the private sector to facilitate or work with your state school boards association. Doing so can help build bridges between your board and your superintendent, and they can make a significant contribution to the long-term success of your students. ■

Doug Eadie (doug@dougeadie.com) is founder and CEO of Doug Eadie & Company. A contributing editor to *ASBJ*, he is the author of 18 books on board and CEO leadership.