

A Guide to Strategic Board Retreats in Higher Education

Edited by R. Barbara Gitenstein

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About AGB

At the Association of Governing Boards of Universities and Colleges (AGB), we believe in the power of higher education to transform lives, strengthen inclusive democracy, and support a thriving society. We believe that strong higher education starts with great governing boards. AGB provides advocacy, leading practices, educational resources, expert support, and renowned programs that advance board excellence for 40,000 AGB members from more than 2,000 institutions and foundations. For more than 100 years, AGB has been the trusted resource for board members, chief executives, board professionals, and key administrators on higher education governance and leadership.

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Contents

Foreword <i>by Ross A. Mugler</i>	v
Executive Summary	vii
Chapter One Basics of a Successful Board Retreat <i>R. Barbara Gitenstein</i>	1
Chapter Two Setting Strategic Direction in Today's Higher Education Environment: The Board Retreat <i>Mark A. Heckler</i>	9
Chapter Three Financial Sustainability: Avoid Magical Thinking <i>Lawrence R. Ladd</i>	27
Chapter Four Strategic Board Retreats for Justice, Equity, Inclusion, Belonging, and Freedom of Speech <i>Carlton E. Brown</i>	39
Chapter Five Governance as a Retreat Topic <i>Carol A. Cartwright</i>	61
Chapter Six Board and Presidential Assessments: Connecting Performance to Strategy <i>Theodore E. Long</i>	81
Chapter Seven Shared Governance: Clarifying Roles and Responsibilities across Campus <i>Steven C. Bahls</i>	91
Chapter Eight External Influences: Managing Constituent Engagement <i>Jill Derby</i>	107
Chapter Nine Advancing Student Success for Governing Boards <i>Kemal M. Atkins</i>	123
Appendix A Principles of Trusteeship	135

Appendix B	Illustrative Statement of Commitment and Responsibilities	137
Appendix C	Sample Board and Presidential Responsibilities	143
Appendix D	Model Statement on Shared Governance	149
Resources		151
Notes		159
About the Editor and Authors		161
Acknowledgments		163

Foreword

Higher education stands at a crossroads, shaped by a rapidly shifting landscape of challenges and opportunities. Institutional leaders and governing boards must navigate financial constraints, public scrutiny, demographic shifts, technological disruptions, and evolving expectations of students and stakeholders. Now more than ever, boards must embrace their fiduciary responsibilities with strategic foresight, ensuring that their institutions not only survive but thrive in an uncertain future.

A governing board's ability to lead effectively hinges on its capacity to engage in meaningful discussions about institutional direction, sustainability, governance, and student success. However, these complex conversations cannot take place in isolation or be overshadowed by the daily pressures of organizational management. Board retreats, when properly planned and executed, provide a rare and invaluable opportunity for trustees to step back from the immediate and immerse themselves in focused, strategic dialogue. These retreats can be transformative, allowing boards to deepen their understanding of pressing issues, reinforce their role in institutional governance, and align their actions with long-term priorities.

This book is a pragmatic guide designed to help governing boards maximize the effectiveness of their retreats. Authored by some of the most respected experts in higher education, each chapter addresses a critical aspect of board engagement and strategic planning. From the foundational elements of successful board retreats to the nuances of shared governance, strategic planning, assessments, constituent engagement, freedom of speech, financial sustainability, and student success, the chapters offer actionable insights to strengthen board leadership and institutional resilience.

The Association of Governing Boards of Universities and Colleges (AGB) is proud to offer this resource to board members, presidents, board professionals, and other higher education leaders who are committed to thoughtful governance and continuous improvement. We believe that the insights contained within these pages will empower boards to approach their work with renewed purpose and clarity. As you embark on the journey of refining your board's role through strategic retreats, we hope this book serves as both a guide and an inspiration.

The future of higher education depends on the leadership and vision of its governing boards. May your retreats be productive, your discussions insightful, and your decisions impactful for the institutions and communities you serve.

Ross A. Mugler

Chair, AGB Board of Directors, March 2025

Executive Summary

THE CURRENT HIGHER EDUCATION LANDSCAPE poses a multitude of challenges both old and new that require governing boards to understand their fiduciary roles and act with strategic insight. Board retreats represent an often-underutilized opportunity—removed from everyday operational concerns—to focus on an institution’s long-term strategic direction in a way that leverages a board’s tremendous talents. AGB offers this book as a pragmatic tool to increase the effectiveness of board retreats. This manuscript features a group of authors who are some of the most respected and talented experts on the salient issues in contemporary higher education. Each chapter describes a key process or topic for a board retreat, common challenges boards face, and specific recommendations for improvement.

Chapter One:

“Basics of a Successful Board Retreat”

This chapter explains the features of a successful governing board retreat, no matter the focus or subject area. The best retreats involve significant planning and preparatory work, take the participants out of their daily routines, include an experienced and objective facilitator, and have a specific topic for the meeting, with a clearly established rationale which is broadly shared by board members. The topic chosen for the retreat likely will echo challenges that are facing higher education in general.

Chapter Two:

“Setting Strategic Direction in Today’s Higher Education Environment: The Board Retreat”

An institution’s mission, vision, and direction are among the most important fiduciary assets that trustees are charged with protecting and enhancing. This chapter explains why and how the retreat setting offers an opportunity to set aside the tyranny of the immediate so trustees can engage in fundamental conversations about who they are as an institution, what they value most, what sets them apart from the competition, and where they need to go.

Chapter Three:

“Financial Sustainability: Avoid Magical Thinking”

Retreats are almost always related to financial concerns because every decision a board makes involves money, either directly or indirectly. However, the board’s fiduciary duties involve more than balancing an annual budget. Boards are entrusted with the long-term mission and success of their institution.

This chapter explains that an effective retreat on financial sustainability requires participants to explore the right underlying questions concerning the financial health and goals of their institution, and follow-up on the lessons learned.

Chapter Four:

“Strategic Board Retreats for Justice, Equity, Inclusion, Belonging, and Freedom of Speech”

Board retreats and workshops on issues related to diversity, equity, inclusion, and justice as well as freedom of speech are increasingly delicate and difficult undertakings. Work related to these issues necessarily engages and challenges the institution’s values and conventions as well as the values, beliefs, experiences, and perspectives of board members. As this chapter explains, no two campuses will or should approach these issues in the same manner. Building community and partnership among board members and between the board and the leadership team must be one of the tacit goals of deeply involved retreats.

Chapter Five:

“Governance as a Retreat Topic”

Although their reasons vary, most higher education boards sooner or later will choose governance as a retreat topic. This chapter explains that governance in higher education is different from governance for other types of institutions and organizations because the mission of teaching, research and scholarship, and service is unique. Board retreats on governance often tackle questions about whether the board is working at the highest or most strategic levels of governance—while leaving management to the chief executive and the leadership team—and how to fulfill their fiduciary responsibilities to the institution.

Chapter Six:

“Board and Presidential Assessments: Connecting Performance to Strategy”

Comprehensive board and presidential assessments are governance best practices that provide significant opportunities to link the performance of boards and their presidents to the shaping and realization of institutional strategy. Realizing that promise is a multi-stage process, at the heart of which are board retreats and review sessions in which boards process assessment results and shape future directions. To address ongoing institutional and societal changes, boards should conduct such assessments on a regular basis.

Chapter Seven:

“Shared Governance: Clarifying Roles and Responsibilities across Campus”

As this chapter explains, a retreat with shared governance as its primary focus can move an institution’s leaders from thinking about shared governance as a set of rules that create conflict to viewing shared governance as shared responsibility and shared accountability that creates alignment. Many boards have successfully used retreats to move shared governance from a construct that slows down decisions to one that becomes an engine of change. When implemented correctly, shared governance can promote alignment among boards, faculty, administrators, and staff in a way that makes the institution much nimbler.

Chapter Eight:

“External Influences: Managing Constituent Engagement”

In an era marked by public skepticism and uncertainty across the higher education landscape, college and university governing boards must step up their outreach and influence on their institutions’ external constituencies. Board independence supports this advocacy in ways not as available to presidents and internal actors. Trustees have a critical role to play in bridging the gap between the public’s limited understanding of the value, mission, and role of the nations’ colleges and universities, and a fact-based analysis of the value of a college degree. A board retreat is an excellent setting to discuss and strategize ways to bring influential board voices into effective external outreach efforts to advance institutional priorities.

Chapter Nine:

“Advancing Student Success for Governing Boards”

Higher-education board members must understand that student success, which is measured by the academic performance, engagement, and outcomes of a college or university’s matriculants, is a significant part of their institution’s mission. This chapter explains the board’s role in student success, recommends tools and metrics for evaluating the student experience at their institution, and describes the foundational elements for planning and facilitating a strategic retreat on student success.