

# Retreat Planning

## Books:

- Brown, H. Jackson, Jr. - *Life's Little Instruction Book*
- Suess, Dr. - *Oh, All the Places You Will Go*
- Fulghum, Robert - *All I Really Need to Know I Learned in Kindergarten*
- McWilliams, Peter and Roger, John - *The Portable Life 101*

## Locations:

- Area hotels
- Campus offices / rooms
- Camping grounds
- Local alumni / residents homes
- State parks

## Agenda(s): Important items to include

- Opening activity / ice breaker
- Meals and prep time to cook / clean up
- Both large and small group activities
- Unstructured time to allow thought growth and development
- Breaks
- Group interaction and discussion
- Sufficient time in case activities run over schedule
- Evaluation and assessment

## Steps for Planning Organizational Retreat

### **I. Assessment of Needs**

- A. The assessment should be conducted by either the coordinator(s) of the retreat, member(s) of the planning committee, the president, or other officer(s) designated by the planning committee
- B. Assessment will help identify concerns, needs, and desired outcomes as well as determining the participant's preferred format for the program
- C. The method of assessment should help determine what types of activities and programs to be used, the style of presentation, and to what extent the retreat will focus on the following:
  1. Problem solving - focusing on immediate problems of an organization
  2. Competency model - focusing on possibilities and desired outcomes (where are we now..., where do we want to be?)
- D. Methods of Assessment - Important to use advisor and/or facilitator in assessment process to get as much objective information as possible

1. Questionnaire
2. Personal Interviews
3. Combination of both questionnaire and interviews
4. Observation

## II. Setting Goals and Objectives of Retreat

- A. Objectives would be related to the needs identified in the assessment and focus on what the retreat is attempting to accomplish.
- B. Objectives should be broken down according to the types of learning to be achieved:
  1. Knowledge Learning - What information participants possess after the retreat (Constitution, policies, organizational goals, etc.)
  2. Skill Learning - What skills should participants possess after the retreat (Time management, planning / programming skills, confrontation skills, etc.)
  3. Attitude Learning - What attitudes should participants possess after the retreat (group cohesiveness, optimism, respect, value formation, etc.)

## III. Organization of Retreat Planning

- A. This step involves determining the activities, content, and programs which will best accomplish the retreat objectives.
- B. Select the topics and methods to be covered.  
Factors to Consider:
  1. Will the topics and methods meet the objectives of the retreat?
  2. Are the topics consistent with the participants' expectations, skills, and knowledge level?
  3. Are there resources, materials, and staff available for the topics and methods selected to be covered?
  4. Is there sufficient time and space available to accommodate the topics and methods selected to be covered?
- C. Examples of possible methods and topics
  1. Team building exercises - Develop group cohesiveness
  2. Lecture - Education on organization's constitution and policies
  3. Role play - Confrontation skills
  4. Brainstorming - Goal setting

## IV. Retreat Details

- A. Logistics - This step of the planning process includes factors such as practical constraints of money, time and staff availability, physical space and equipment limitations, as well as size of the group involved
- B. Budgeting - This is a very critical component of the planning process. Budgeting should be taken into consideration throughout the entire planning process. Factors to Consider in Budgeting Process:
1. Facility cost
  2. Materials, copying, and equipment
  3. Refreshments and/or meals
  4. Certificates and recognition
  5. Outside presenters
  6. Travel
- C. Selecting the Date and Time:
1. Needs and expectations of participants should be taken into consideration
  2. Must be sufficient time to achieve objectives of retreat
  3. Notification of date and time should be set to allow participants sufficient time to plan ahead
- D. Choose the Facility:
1. Area and space should be sufficient to conduct activities and program
  2. The climate of facility should be conducive for the learning process of the retreat
- E. Designating Responsibilities - This step involves delegating planning responsibilities and selection of staff / members or outside individuals who will be presenting topics or facilitating events
1. Designate planning responsibilities to members of planning committee
  2. Request services from outside presenters or facilitator
  3. Preparation of activities / programs to be implemented by organizational members
  4. Develop a checklist of tasks to be completed and by whom
  5. Develop a step by step plan of action (Example)
- | <u>Time</u> | <u>Activity</u>   | <u>Objective</u> | <u>Responsibility</u> | <u>Equipment</u> |
|-------------|-------------------|------------------|-----------------------|------------------|
| 10 - 10:30  | Open / Icebreaker | Attitudes        | John Smith            | None             |
| 10:30 - 11  | Goal Setting      | Knowledge        | Jennifer Jones        | Handouts         |
| 11 - 12     | Lunch             | Attitudes        | Betty Brown           | Food             |
- F. Promotion of Retreat - Essential to publicize the retreat and inform participants on agenda, goals of retreat, and communicate importance of retreat

## **V. Execution of Retreat Plans**

### **A. Setting up Process**

1. Confirm responsibilities with planning committee to make sure all tasks are completed
2. Allow a sufficient amount of time to arrive ahead of beginning time to set up and organize material, equipment, refreshments, etc.
3. Provide plan of action for all retreat organizers and presenters to refer to during the program

## **VI. Evaluation**

### **A. Evaluation of the retreat should provide feedback on:**

1. The planning process (by Planning Committee - done throughout retreat planning)
2. Each activity component of retreat (by Participants)
3. If the goals of retreat were met (by participants and planning committee)
4. Usefulness and applicability of activities to the organization (by participants and planning committee)

### **B. The phases of the evaluation process should involve the following steps:**

1. Organizational - made at the initial step of the planning process (assessment)
2. In-Process - Throughout organization of planning responsibilities and implementation of retreat (done through verbal and survey methods)
3. Program Feedback - Immediately after retreat process (usually by survey method)
4. Follow-Up - Done three to six months later to evaluate progress which has been made since the retreat

### **C. The different phases of the evaluation process can be compared to evaluate and assess if the goals of the retreat were met.**

## **VII. Follow-Up**

- A. Thank you's for planning committee and outside presenters / facilitator
- B. Pay bills
- C. Summarize evaluation results

- D. Organize evaluation report to share with participants
- E. Analysis of issues and ideas developed at retreat
  - 1. How are ideas being implemented
  - 2. If goals of organization are being met
  - 3. Are skills (cognitive, behavioral, affective) being utilized within the organization
  - 4. Use information from follow-up in the planning process for next retreat

**VIII. Other Factors to be Taken into Consideration**

- A. Allow sufficient time in the planning process
- B. Establish Clear Retreat Goals - the more specific the goals and objectives, the more explicit the design, with a better chance of meeting the needs of the group
- C. Maintain Variety - vary the time, amount of risk, presentation, presenters, settings, and the type of interaction during the retreat
- D. Be Creative - this will create interest and facilitate further involvement and interaction of participants
- E. Involve the Group - Important to involve the group in activities and programs. The more active the participants, the greater the interest and learning will be.
- F. Allow for Breaks
- G. Participants will learn best when they can experience and practice.
- H. Learning can and should be fun
- I. Individuals will take greater risks in group situations if the group is supportive
- J. People seldom learn the first time - new ideas are learned while building on the old (sequencing and reinforcement)
- K. Incorporate socializing into overall program
- L. Integrate interaction and recognition into retreat (provide certificates, awards for most presentation, etc.)
- M. For more suggestions or ideas, seek the advice of professionals, mentors, and / or advisors