



Retreat to Advance



***The Why's, How To's and Ah-Ha's
of Planning
Your Board Retreat***

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The Case For Retreats

Why We Bother



Retreat: A gathering of key chapter leaders that is off-site and separate from your normal board meetings. A blend of work and play.

There are many benefits to staging a retreat at the beginning of each chapter year. Among them:

- ▶ Strategic planning opportunities
- ▶ Articulate a vision for the year
- ▶ Chance to sort out roles and responsibilities
- ▶ Continuity: transition and/or blending between predecessors and successors
- ▶ Get to know each other informally
- ▶ Skill-building opportunities
- ▶ Ritual: A Ceremonial Beginning
- ▶ Appreciate differences in learning styles, communication styles, leading styles, etc,
- ▶ Model teamwork for others
- ▶ Set tone for the year
- ▶ Identify special needs, potential problems in advance
- ▶ _____
- ▶ _____

Considerations

- ▶ Just board vs. board + key leaders
- ▶ In town vs. out of town
- ▶ Chapter underwrites vs. co-pay
- ▶ No nights/one night/two nights...
- ▶ Led by insider / outsider
- ▶ Each participant a presenter
- ▶ Sharing rooms
- ▶ Degree of structure vs. unstructured:
Mix of Focus vs. Fun

Items to Address During Retreats

- ▶ Schedule for Board Meetings, conference calls and reports
- ▶ Budget
- ▶ Programs
- ▶ Expectations and goals for year
- ▶ How to build committees & teams
- ▶ Dispute resolution
- ▶ Brainstorming
- ▶ Themes and campaigns

Stuff That Works!

Pieces to your Retreat



► Pieces to your Retreat: Fun with Focus:

- Ice breakers
- Team-building activities,
Brainstorming
- Partnering activities
- Problem Solving

► Free time

► Benefits of bunking

► Skill builds:

- Recruiting board members,
committee members,
guests
 - How to promote your
chapter
 - Handling gossip
- Facilitator and scribe
 - Action plan
 - Going public with results
 - Nature component (value of solitude)

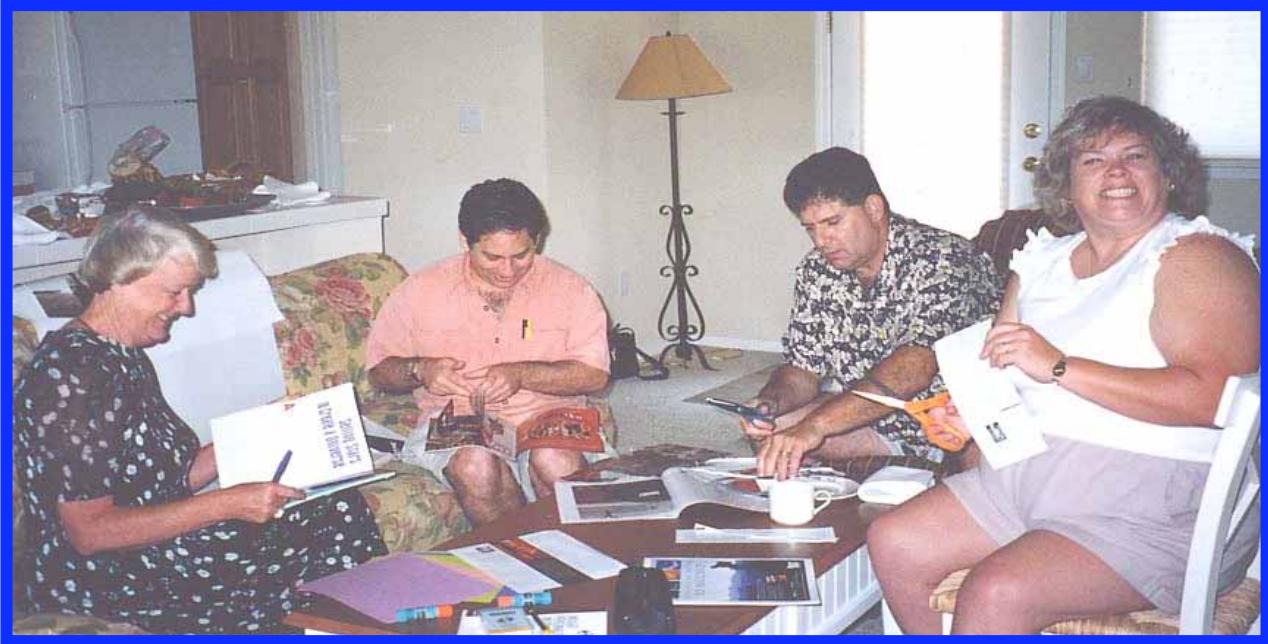


Recommendations



- Identify dietary restrictions in advance and plan accordingly
- Seek opportunities for carpooling (good for teamwork and the environment)
- Set expectations prior to arrival so tone, protocols and objectives are clear
- If soliciting input in advance make sure to indicate if responses are held in confidence vs. shared.
- Bring a camera or videocam!
- Celebrate occasions that coincide (birthdays, anniversaries, etc.)
- Talking Stick not a bad idea!
- E-mail nsa@craigspeaks.com for a free PDF of Craig's "Ice Breakers for Speakers and Trainers" you can use for your next retreat





Budget Considerations

Rates vary by location, number of days, number of attendees and level of extravagance. Consult your budget and treasurer, as well as your local Convention & Visitors Bureau for recommendations within your budget.

Likely expenses can include:

- Room
- Board
- Supplies (flip charts, markers, etc.)
- Facilitator
- Munchies

Stuff to Bring:

- Fun Stuff (musical instruments, tchotchkes, etc.)
- Disposable cameras
- Mood music for different activities (game show themes, instrumental music, etc.)

Photos (top to bottom): Collage session; Explaining collages; It's over!

Craig's article published by *Transaction World* magazine: August, 2005:

<http://www.transactionworld.net/articles/2005/August/motivation2.asp>

Retreat To Advance: How Retreats Advance Your Organization's Causes and Campaigns By Craig Harrison

Offsite retreats are invaluable tools for furthering your group or organization's objectives. Done well, retreats can set your group up for years of success. Done poorly, retreats can consign your group to frustration, failure and a fruitless expense of time and energy. As one who has planned, led and debriefed a variety of offsite gatherings I know from experience of the good, the bad and the ugly of retreats. Why bother? The benefits to well-run retreats are many.

An effective off-site retreat can help a new team congeal and help existing teams find new ways to succeed. Retreats help participants refocus, renew and replenish their spirit. For boards or teams adding new members or embarking on a new initiative, retreats let you clear the air and start on the same page. Perhaps most valuable about retreats, you often get to know each other beyond official roles. Trust engendered during a retreat on a personal level often proves invaluable down the road when the going gets tough.

Dating Dilemmas

The hardest part about designing a retreat may actually be picking dates that allow for full attendance of your invitees. Yet this is central to success. Take effort to find dates that work for all. Recognize others have various outside commitments and travel time is involved too.

Location, Location Relocation

Once your dates are solidified so all can attend for the duration, site selection becomes critical. Pick a location conducive to your aims. Having experienced retreats at country clubs, a Zen center and in an empty urban office building I can tell you not all sites are the same. To get out of the box thinking you should get out of the box!

Environment Informs Experience

I find great value in choosing sites with a nature component. It's calming and helps put everything in perspective. Don't underestimate the power of nature to nurture your team. Build in time for walks, contemplation and play, ideally in the woods or fields or on a coastline.

Balancing Focus and Fun

Part of your challenge is to identify overall goals and expectations and then create an agenda to allow for their fulfillment. Make sure your agenda has time for free thinking, problem-solving, strategizing and fun too. If you have birthdays or other milestones occurring during or around your retreat time make sure to build in time for recognition. Don't fill up all your meal time with work. Magic can occur during downtime, "in-between" time and while having fun. Cultivate it through the tone set at your retreat. One board of mine bonded over the byproducts of potent eggplant served during a vegetarian meal. We're still laughing about it two years later.

Retreats Difficile Sans Facilitator

I highly recommend a trained facilitator for part or all of your retreat. Whether internal or external, facilitators can play traffic cop, say things team members can't, and they keep people on their best behavior. Help them help you. Prepare them as to your aims, who people are and about your organization or team's ethos. I've seen facilitators crash and burn in the first 15 minutes of a retreat as a result of lack of preparation or inattention to details surrounding confidentiality, integrity and impartiality.

A Role for All

Retreats work best when every attendee has both a stake and a role in the outcome. Share leadership of your retreat where possible. Let each attendee prepare and deliver a piece of the programming. It's good for all. Whether you assign attendees to lead ice-breakers, nature walks or serve as scribe and record retreat minutes, get others involved.

Additionally, make sure you leave with action items that are publishable, sharable and track-able.

Additional considerations:

- ◆ Identify dietary restrictions of attendees in advance and plan accordingly
- ◆ Set expectations prior to arrival so tone, protocols and objectives are clear
- ◆ If soliciting input in advance make sure to indicate whether or not responses will be held in confidence
- ◆ Bring fun items like talking sticks, drums, noisemakers, idea-stimulating games to get peoples' juices flowing. Bring a camera.
- ◆ Facilitate carpooling and intelligent room-sharing to further foster teambuilding and camaraderie.
- ◆ Make sure to have flip charts, colored markets and writing utensils. Someone always forgets a pen or pencil! Drums are optional.

Tricks and Treats of Retreats

For my free e-report on ice-breakers for your next retreat e-mail www.ExpressionsOfExcellence.com/tw_icebreakers.pdf. For a PDF with more retreat how-to's and ah ha's, e-,mail www.ExpressionsOfExcellence.com/retreats.pdf

Craig Harrison's Expressions Of Excellence!™ helps professionals express their sales and service excellence with style, Contact him at (888) 450-0664, via Excellence@craigsspeaks.com or through www.ExpressionsOfExcellence.com.