

PLANNING EFFECTIVE RETREATS

TOP TEN TIPS
FROM RON MILAM
CONSULTING

Retreats can add value to your organization in the following ways:

1. **To make important decisions about your organization:** Retreats give participants the opportunity to build agreement and support for a variety of critical decisions, such as your organization's mission, vision, values and goals. While these can be built more slowly through a set of regular meetings, retreats can provide the space and continuous time needed to foster the creative thinking, processing, and commitment for such decisions.
2. **To plan a major event, campaign, fundraising strategy or board recruitment plan:** Retreats provide great opportunities to bring together key stakeholders to develop a big plan and action steps that guide your organization as you move forward. By helping these stakeholders focus for an extended period of time, a retreat can also generate the enthusiasm and commitment necessary to successfully implement such a plan.
3. **To build a stronger team, community, or to orient new members:** Retreats offer you plenty of opportunities to participate in meaningful activities that help participants get to know each other better. It can also be a place to orient new folks, including new board members, to your organization and help them to feel a part of the community.
4. **To provide training:** Retreats grant you extra time to build the capacity of your organization's leadership in areas such as fundraising, communications or whatever else your organization needs to address. With an increased capacity, your leadership will be more likely to succeed.
5. **To resolve conflict:** Sometimes your regular meeting isn't enough time to resolve a major conflict in your group. Retreats give you the needed space to resolve conflict and find ways to take positive steps forward for the organization.
6. **To take extra time:** Sometimes extra time is required to really move through complex issues or discussions. Retreats provide your organization with extra time to solve whatever your leadership needs to figure out in order to move forward.
7. **To share information and get feedback:** Sometimes, especially in larger organizations, it can take a lot of work just to get everyone on the same page. A retreat can be a way to aid different groups or departments in sharing information about what they're working on through something other than an email or standard meeting presentation and help them to communicate their passion and commitment.
8. **To assess and reflect upon your organization and build capacity:** One aspect that can help distinguish a retreat from your shorter meetings is the chance to spend more time going over your organization's strengths and areas of potential growth, and also to review the environment you operate in and how you might respond to current trends to help your leadership make smarter choices.
9. **To advance or deepen thoughts:** Sometimes the pace at which we find ourselves working day-to-day is so fast it doesn't allow us to ask the bigger questions about the work we are doing. A retreat can be a great place to bring people together to think about questions or problems that are perpetually put aside in the normal rush of everyday demands.
10. **To gain clearer perspective or avoid traditional routines by getting away:** When you take the time and energy to "get away", you can clarify your perspective on your organization and make you make smarter choices. It's also good to switch things up every once and awhile. With some planning and intention, some real magic can happen at retreats.

TO-DO LIST

- Designate a Planning Lead or Committee* that will meet before the retreat, to plan logistics and carry out the rest of this to-do list.
- Decide Upon a Location.* Ideally the site you choose will be one that feels "far away" and yet is geographically accessible to all members of the group.
- Decide Whom to Invite.* Board? Staff? Volunteers? External Stakeholders?
- Engage Participants Before the Retreat* by asking for their input on the draft agenda.
- Develop an Agenda* with clear goals and outcomes. Prioritize the two or three most important decisions you need to make.
- Make copies of the agenda and any other materials, and send them* to participants prior to the retreat, including directions to the location.
- Plan for Engaging Activities* that combine large group discussions with small group work, one-on-one work, various team building activities, games and fun.
- Plan for Meals and Movement.* Do your best to avoid "working lunches" and instead plan meals that give attendees the opportunity to chat informally. Remember to take a 10 or 15-minute break after any 90-minute stretch of discussion.
- Designate a Facilitator* by either designating one or multiple people within your own organization to facilitate the actual retreat, or by hiring an outside facilitator. Professional facilitators bring a variety of tools and methods designed to maximize the value of retreats.

Ron Milam has over 14 years of experience facilitating meetings and developing leadership for over 50 organizations.

www.ronmilam.com

(323) 793-0591