

Retreat So You Can Move Forward

A Guide to Planning and Implementing Effective Retreats for Your Group

by Ron Milam and Meg Wade

This article will help those considering planning a retreat for their organization to gain a big-picture look at the how-and-why of a solid retreat, and offers an overview of the key details that make a retreat successful. We hope it will be helpful for those planning retreats for the first time, as well as for experienced planners looking for new ways to improve their retreats.

Planning Your Retreat

Why retreat? What is the value of a retreat? Why hold a retreat instead of a regular meeting? Many of us have experienced the good that can come from a well-implemented retreat. We have come away invigorated, with a clearer sense of purpose, feeling more connected to our colleagues and partners. For those who have yet to attend such retreats, or who have sadly been to retreats that seemed little more than distractions from more pressing matters, the reasons for putting in the time and energy needed to host a successful retreat may not be as obvious.

All of these are good reasons to retreat, and retreats can accomplish more than one of these purposes. But the important point, when planning a retreat, is to know which of these you hope to achieve. Don't assume that they will happen on their own, but instead, plan the activities around the specific goals you have in mind. A retreat geared toward team-building will differ from a retreat focused on making key organizational decisions. If you're planning the former, you might include some team-building exercises.

The key is to develop the primary two or three goals for your retreat. Goals are what you hope to accomplish during your retreat. For example, an overall goal of a retreat could be to envision the future of the organization and build a stronger team through the process.



Members of the Bicycle Kitchen working on a vision statement during their retreat



Ten Good Reasons to Host a Retreat

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: Convening in a different environment— even if it is not geographically remote— can aid in clarifying your perspective on your organization and making smarter choices. It's also good to switch things up every once in a while. With some planning and intention, some real magic can happen at retreats.

In addition, it's important to prioritize expected outcomes. Outcomes are specific decisions you hope to make or products you want to generate at your retreat. For example, outcomes could involve achieving consensus on a new mission, vision, values and goals for your organization. These would be written up and inserted into a new strategic plan for the organization.

It's also worth noting that while retreats are exceptional spaces for achieving these goals, they are not the only means by which to do so. Retreats take time and other resources to put on, and tend to be most effective when they are done as special events intended to enhance your regular meetings. If your organization needs to complete a number of the above goals, consider which will benefit most from the retreat space and which might be done at regularly scheduled or shorter, additional meetings.

Convening Your Retreat

After you know why you want to retreat and have an idea of your goals and outcomes, the first steps in retreat planning are those of convening, including deciding who will come together to plan the retreat, who will attend the retreat itself, and where it will be held.

Who Should Participate?

There are a number of groups to consider asking to participate in planning or attending. In a nonprofit organization, this might include board members, staff members, volunteers, and other stakeholders, such as community members benefiting from the work of your organization.

Not everyone who attends the retreat needs to be part of the planning process, though they all might be and can bring useful perspectives to help shape the retreat. If an outside facilitator will be used, he or she should definitely be brought in as part of the planning process as well.

Are Retreats Worthwhile? Two Success Stories

Achieving Consensus for Organizational Development:

Ron facilitated a two-day retreat for the Bicycle Kitchen, a growing community-based bicycle education and repair space in Los Angeles, with several dozen members at a crucial stage in their organizational development. The retreat allowed this group to confirm their mission and values and decide whether to incorporate as a separate nonprofit organization and elect its first-ever Board of Directors. The extra time afforded by the retreat allowed each person's thoughts and concerns to be shared on the matter, providing the entire group a chance to see where consensus existed. Shorter meetings could not offer this possibility. The important decisions arrived at during this retreat enabled the group to grow as an organization and successfully make the transition from its initial set of founders to a new generation of leadership.

Bringing Together New Members and a New Mission:

Meg facilitated the board meeting of a community-based organization dedicated to building green, neighborhood-based economies. The organization held its retreat to refine its mission so it would fit the existing capacity of the organization and integrate several new board members. The board usually held its meetings after its members' normal work day, meaning board members were often tired. Time for broader discussions would be limited. By gathering the entire board together in the home of one member for a full Saturday, new board members were able to spend significantly more time getting to know the whole group. At the same time, directors had the opportunity to sift through different ideas and opinions on the most crucial aspects of the organization's work. By the end of the day, a new mission statement had been created, and the group members both new and returning found ways to plug into their strategic plans, to bring the organization's activities in line with the revised mission statement.

When inviting certain persons or members, also consider:

1. What role in decision-making will each group play? For instance, if volunteers and board members are attending together and decisions are being made about the organization’s mission, how will that affect the decision? Will all attendees or only board members have a say? If attendees do not have decision-making authority, what level of input do or might they have? Is there anyone you are inviting to attend simply with the expectation that they will listen and observe?
2. What is the decision-making process? Make sure to clarify beforehand and at the retreat itself the method by which decisions will be made. You can use various systems of voting. Simple-majority voting is the most basic. If the group chooses to use voting, make sure this decision is arrived at via a higher level of agreement, such as super-majority voting. You could use different forms of consensus, such as pure consensus in which all members formally agree to the decisions. You might use modified consensus, where after a certain period of discussion, a “fall-back” vote is held. Finally, combinations of voting and consensus provide another possibility. For instance, the group could vote on minor issues and achieve consensus on more important questions.

<i>Possible Attendees</i>	Reasons for Inviting	Reasons for Not Inviting
Board Members	Usually these are your key decision-makers, and you need them if large decisions for the organization are going to be made.	If the goal of the retreat is to improve relationships among organizational staff, board members need not be present.
Staff	Staff have critical information about the day-to-day operations of an organization, that is not available to, or often not seen by board members. They will often also be the ones carrying out the decisions made at a retreat, and hence it can be important to make sure they are part of the agreement reached on those decisions. You may also decide to invite some, but not all, staff members; for instance, you might want to invite executive staff rather than general staff.	A long retreat can be seen as an onerous requirement for staff members who have other deadlines and obligations to meet.
Volunteers	Organizations that rely heavily on volunteer support may be able to both leverage that support in putting on a retreat, and gain insight from the information, input and perspective volunteers can provide. Volunteers who experience a board retreat may also be excellent candidates for future board seats or staff openings.	Certain decisions may require sharing great amounts of background information not easily had by volunteers, which can take lots of time. Volunteers may also be unable to commit to the amount of time required to attend a retreat.
Other Stakeholders	Potential external stakeholders include funders, recipients of your organization’s services, peers, potential collaborators, community leaders, and previous staff and board members. All these members can provide their own unique insights.	Each group of stakeholders faces different challenges. Consider what it would mean to integrate each group meaningfully into the retreat with the intended goals.
Outside Facilitator	An outside facilitator can take the pressure of managing the group decision-making process off of board or staff members and allow them to participate more fully in the retreat. Facilitators may also bring methods and skills for resolving conflict, generating ideas, and aiding effective group discussion not held by members of your organization.	You may have strong facilitation skills within your organization, and decide that resources would be better spent elsewhere.

Other questions should be considered. How will those groups be integrated into the decision-making process if they are not present? How will they hear about the decisions made, especially if they are part of those responsible for implementation? How will they connect the moments of big decision-making at a retreat with the daily work that follows, to improve organizational culture and help build momentum to carry out your goals? If there are groups that will be affected by the retreat but are not attending, spend some time considering other ways to positively inform and connect them to the decisions and outcomes of the retreat.

Determining Roles

As you begin to plan, a number of roles and duties should be considered:

Designated Facilitator: Facilitators help structure the time and guide the group through discussions and into creative problem-solving and decision-making. One or more people within your own organization can be designated to facilitate the actual retreat. If several people facilitate, clarify duties for each (for instance, who is responsible for bringing people together after a meal or break?) You may alternatively consider bringing in an outside facilitator.

Why hire an outside facilitator? There are numerous benefits to hiring an outside facilitator. A good facilitator will devote as much time as is necessary to crafting an ambitious but realistic agenda, time that your staff may not currently have available. They can help your group move through decision-making processes in a structured and engaging way, help keep you on track throughout the retreat, and suggest ways to creatively solve problems and make the most efficient use of your time. Outside facilitators are also often skilled at conflict resolution and can help group members to listen to one another, and ensure that everyone feels heard. Most of all, by leading the process, a facilitator allows everyone at your retreat to participate more fully. If tough decisions must be made, a neutral facilitator, by establishing an environment of trust and impartiality, can prevent “steering” where participants who hold passionate positions wield disproportionate influence on decision-making.

Logistical support: Who will handle details concerning food and facilities during the retreat time? Is this something that all attending will carry out together, or something that extra staff or volunteers will attend to assist with? Who will be responsible for coordinating transportation logistics to the retreat site, for sending out any needed materials beforehand, for securing and making payment at the retreat site, and for overseeing and carrying out clean-up?

Documentation and record-keeping: Who will document the proceedings and decisions as they are made, and who will share them with everyone after the retreat? You may decide to have attendees volunteer throughout the weekend, or plan to have everyone share the task in pre-assigned time slots, or have someone assist with note-taking throughout the day or weekend.

Logistics: Location, Budget and More

After identifying and inviting the right people, choosing a good location and working out basic logistical concerns are your next steps. Ideally, you want to choose a location that feels “far away,” which can give

What makes for a great location? All of the following can be helpful.

- Outside space for people to explore and get exercise
- Flexible indoor space allowing for both small and big group gatherings
- Lots of wall space for hanging notes and information
- Windows that allow in light but also have curtains in case it gets too bright
- Comfortable lodgings that fit the needs and budget of your staff or members, if the retreat is far away and more than one day
- Kitchen or dining space, if meals are to be held onsite
- Easy to access by multiple modes of transportation

people a sense of a break even as they settle in to get some serious work done. The sense of distance can also provide mental space, enabling participants to rise above pressing daily concerns and attend to the bigger questions or issues you hope to address at the retreat.

Many of your needs for a retreat location will be connected to the time and money your group has available. Consider both individual and organizational needs and budgets when it comes to planning for lodging, food, and food preparation as well as transportation to and from the retreat location. Once plans are in place, make sure to be clear about whether individuals or the organization is covering specific costs.

Oftentimes the best space is one which a board or staff member already has access to, but which is not used by the entire group on a regular basis. The home of a board member or relative can often make for a great and comfortable all-day meeting space. But again, make sure to clarify expectations with the

host beforehand, so you are aware of what you will be getting out of the space, and the host will know what he or she is expected to provide.

Preparation: The Agenda

As you're planning the agenda, keep in mind that no matter how well-crafted, it will be important during actual discussion to remain flexible. Stay willing to move from the agenda during the retreat itself.

In addition to these ideas, we would like to emphasize two key suggestions for your agenda planning:

- ✓ ***Keep it varied and balanced and include different types of meaningful and engaging activity.***

Discussing everything as one large group can become tiresome after a while— as can sitting down for an entire day in the same space. Help keep the interest level of your participants up by varying the ways in which discussion takes place and decisions get made. You might break into small groups for brainstorming on specific goals and return to a larger group for discussion; you might do a walking discussion outside to help change the pace.

At the same time, though, that you're varying the form of activity, make sure that it retains some sense of meaning so that attendees feel as though their time is being well spent in the movement from one

All of the usual tips for good agenda planning apply to your retreat agenda.

- Have your agenda reflect your retreat goals and prioritize what you want to accomplish;
- Plan it ahead of the retreat itself;
- Set time limits to help the group stay on track;
- Don't pack in too much;
- Review it with attendees beforehand to make sure all are in agreement;
- Stick to the agenda and save good but off-topic ideas for future meetings;
- Plan for breaks, to help group members stay energized; and
- Involve your leadership in both planning and executing the agenda to make sure you end up with the best possible agenda.

form of activity to another. If you break into small groups, make sure the agenda item being considered is appropriately served by using breakout sessions. If you include an icebreaker activity, consider doing one that connects to the content of the retreat.

For instance, Ron recently facilitated a meeting of a coalition comprised of representatives from across a vast region. Rather than having each person go around the table and introduce themselves, their groups, and their roles, he cleared out the space and asked the attendees to physically position themselves in geographical relation to each other, thereby creating a physical representation or map of the coalition's presence in the region. As people met, found out where they were from, and placed themselves in relationship to one another, a visual representation not only of their region but of the coalition's membership and placement within that region soon became available for all to see. With an icebreaker like this, you not only get the benefit of moving and energizing people at the beginning of the day, but you also help provide them with information that is both valuable and more easily remembered. Participants can learn it both kinesthetically and visually.

✓ ***Don't overpack the agenda.***

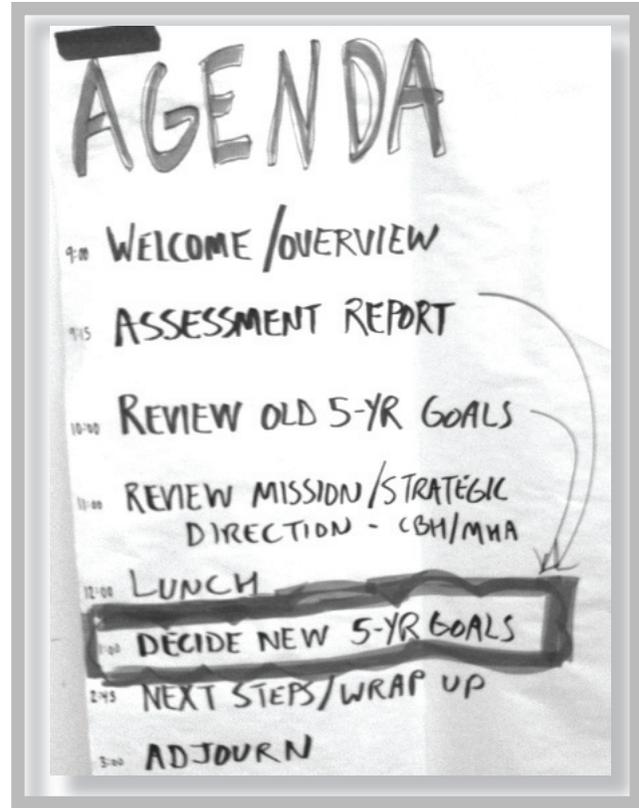
Things will almost always take longer to discuss than you expect. You want to create time for people to be heard and to develop the sense that the best decisions are being made. To do this and to avoid the stress of constantly needing to either change the agenda or cut off conversation prematurely, assign each item a little more time than you think it might need.

In addition, don't forget to make space for breaks, physical activity, and unprogrammed time. Weekend-long retreats are often excellent precisely because they allow for some unstructured time for spontaneous conversation and relationship-building. Important conversations can happen informally during meals or physical activities like walks, bike rides or games.

Avoid “working lunches.” Instead, give people the opportunity to chat. Remember to take a 10 or 15-minute break after working for 90 minutes. By filling your agenda with engaging and purposeful activity and allowing time for attendees to process and discuss the content informally, you should be on your way to making the time spent at a retreat with your colleagues both enjoyable and productive.

What should your agenda include?

The agenda orients your team to the specific use of time planned for the retreat along with its broader goals and purpose. It is also a great place to include key information (such as the retreat location) so that all the needed info is gathered in one place for attendees. We have attached a sample agenda at the end of this article to help you in your agenda planning.



When deciding what to include in your agenda, think about the goals for every moment of the retreat. Below we’ve included some of the broad types of activities that might be done based on given goals. The sample agenda includes more specific examples of each type of activity.

1. *Orientation and Agenda Overview:* Kick off your retreat by making sure everyone knows the plan for your time together by reviewing the agenda, the ground rules, and the process for making decisions (consensus, voting, etc.)
2. *Team-building Activities:* Icebreakers often start a retreat. Sometimes they replace standard introductions. But they can also be done throughout a retreat, especially if you are meeting for more than one day. Use them to help get people moving after a long lunch or to generate space between long periods of discussion or discussion of different topics.
3. *Information Sharing:* Good for the beginning of your retreat to help inform people of anything they should know as the retreat goes on. If you conducted an assessment or survey beforehand, share its findings here. You might also share important documents to help shape the tone of the discussion, such as your mission statement. Or, if a goal of the retreat is to orient new board members or volunteers, you might use some time to talk about the organization’s history and how it has grown to its current state.
4. *Idea generation:* Perhaps you need to come up with solutions to a problem the group has identified, or you simply may want to come up with lots of ideas about the goals for the group throughout the

next few years. Either way, keep in mind when you want to generate ideas, and distinguish this from the period of time in which decisions about those ideas are made. Ideas can be generated in a variety of ways. Brainstorming is one of the most popular, whether done as a large group, in small groups, or individually, but you might also have people come up with ideas through any number of creative exercises.

5. *Processing and Deciding:* Moving from idea generation to decision-making can be done in many different ways. An outside facilitator can be very helpful in this regard. A trained facilitator possesses a variety of techniques that can help a group sort through and prioritize ideas and make complex decisions. Beyond simply assisting with large-group discussion, a skilled facilitator is able to help a group sort through ideas visually or physically, helping participants see things “with new eyes.”
6. *Breaks:* Do include breaks! They give participants the time to rest, reflect, move, and prepare themselves for what comes next. Generally, 15 minutes is an appropriate break time following a 90-minute session.
7. *Next Steps:* Take some time at the end of the meeting to figure out what needs to happen next, who will be responsible for making this happen, and when it needs to happen. This will help ensure a group implements the decisions it makes.
8. *Evaluation:* Help provide a sense of closure, create a space for celebration, and also improve your next retreat by setting aside some time at the end for evaluation. You might do a written evaluation, or a simple go-around in which each participant shares one thing they think could be improved and one thing they really enjoyed.

Again, please see the sample agenda which follows for an example.

Preparation: Getting your team ready for the retreat

After working out logistics and planning your agenda, making sure your participants are well prepared for the retreat itself is the next step. Lead-up time must be well spent. Key to this is involving the participants in the planning for logistics and scheduling. Simply choosing an arbitrary weekend and informing people of the time may mean that key individuals have conflicts and are unable to attend. Once you know who should attend, find a way to schedule the retreat so that everyone can show up. If you're having trouble scheduling with a large group, you might check out a tool like <http://www.doodle.com> or <http://www.meetingwizard.com/>, to help you find the time that works for the most people.

Similarly, involving participants in other logistical planning will help you flesh out barriers to participation or decisions that could cause resentment.

- The staff may resent being required to pay for meals at a mandatory event.
- Members without access to cars or funds for travel may be unable to participate if the retreat location is far away and transportation is not provided.

- If you are providing food, don't forget to inquire about dietary restrictions. Remain sensitive to allergies, vegetarian or vegan diets, religious restrictions.

The other way to involve your retreat participants ahead of time is to shape their expectations for the retreat and supply them with any information they will need ahead of time.

How do you shape their expectations? One way is to distribute the agenda in advance and to be clear about the purpose of the retreat, the kinds of activities that will occur, and the types of decisions that will be made. In addition to the agenda, you can hand out ground rules beforehand to begin shaping the tone of discussion. Ground rules are the agreements guiding how a group will work together. This could include turning cell phones off during a discussion, or making sure to test assumptions before critiquing other people's ideas.

Other information to include:

- After you have decided how to spend the time at your retreat and you are writing up your agenda to distribute to your team, there are a number of items to remember to include on the physical copy of your agenda:
- Name of Organization: This may seem simple, but is important to clarify, especially if multiple organizations are retreating together to make joint decisions.
- Date and Time of Retreat: Repeat this often, to make sure your participants block out the time to attend!
- Goal: What is the overall goal? For instance, it might be to decide the goals and objectives for the next two years.
- Desired Outcomes: List the specific outcomes that should result from the retreat to help you meet your goal. For instance, a specific outcome for a retreat whose goal is to reconsider the organization's mission might be the drafting of a new mission statement.
- Attendees: List all the attendees so everyone knows whom to expect at the retreat. If the list is quite long, it might be attached to the agenda.
- Location: Be sure to include the address, and not just the name of the location. If the location is unfamiliar to any of the attendees, you might also include directions or a contact number for someone at the site.
- Decision-making: If your retreat is dedicated to making certain decisions, the decision-making process should be clear to all attendees beforehand. Are decisions to be made by consensus or voting? Which attendees may vote and which are allowed only input? By putting this in writing, less time will be spent at the retreat itself on "deciding how to decide" and attendees will also have a better understanding of their roles from the start.
- Lodging and other logistical details: If the retreat is more than one day, include details about lodging. If attendees are responsible for their own meals, you might also note that here.
- Contact Person: Give a name, phone and email address for people who have questions.

What type of information should be shared before the retreat itself? Easy examples include items like budgets; if there are budgetary decisions to be made, participants should be provided with a copy of the budget beforehand. Remember that while some can take in large quantities of information on the fly and process it usefully; others may prefer (and be better able) to do so in advance, on their own, especially if extensive number crunching and difficult reading are required.

Background data can be useful. Similarly, you might consider sharing any other information that will be needed to help make decisions at the retreat. Are you refining your mission and deciding which programs are crucial and which are not? It might be helpful to have someone compile data on the number of people served by or participating in each program, especially if your organization is large. You might provide summaries highlighting the successes of each program. If you are a social change organization using a retreat weekend to think about your larger movement-building strategy, assigning some reading on the topic beforehand can help stimulate thinking so that people are ready to discuss as soon as they show up.

One can, of course, go overboard and provide too much information beforehand, and in so doing, risk the possibility that nothing will be read by anyone. Try to develop a reasonable estimate of how much time your participants will really have to dedicate to preparing for the retreat, in addition to making their own logistical arrangements. If you want to share information, but think that participants are unlikely to make it through all of it prior to the meeting, you might suggest that everyone spend an hour or even just thirty minutes with given documents, with more time at the retreat itself allotted to working through the information. For instance, if a pre-retreat survey has been conducted to garner staff or client feedback on a given program, you might hand out information on the program budget and history beforehand, but task one person with collating the survey data and summarizing it for the whole group at the retreat.

The guideline here is simple. Give everyone a chance to prepare themselves and to be comfortable with the plan for the retreat day or weekend, but don't overwhelm your group before they even begin!

About the Authors

Ron Milam

Ron is a skilled facilitator, trainer and coach who specializes in facilitating effective meetings and developing leadership for community-based nonprofit organizations in Southern California. Since 1997 he's served over 50 organizations in the capacities of Consultant, Executive Director and Board Member. Ron has facilitated over 150 meetings, retreats, seminars and community meetings. Ron is Certified as a Professional Facilitator by the International Association of Facilitators. Prior to founding his own consulting practice in 2005, Ron launched the Los Angeles County Bicycle Coalition, growing it from an idea into a 1,000 member organization as its founding Executive Director. He holds a B.S. in Planning, Public Policy and Management from the University of Oregon.

Meg Wade

Meg has worked as a researcher, consultant, and community organizer for non-profits, including Democracy Unlimited of Humboldt County, and Citizens For Election Integrity Minnesota. Some of her favorite experiences include co-chairing the Transportation Committee for the first-ever U.S. Participatory Budgeting Project (in Chicago's 49th Ward), and organizing a labor union with fellow graduate student teachers at the University Of Chicago. A former board member for both the Humboldt Independent Business Alliance and Local First Chicago, here in L.A. Meg helps promote independent business and culture at Skylight Books.

Annotated Retreat Agenda

Name of Organization: The Justice and Sustainability Coalition

Date and Time of Retreat: Evening of Friday, June 10th, and all day Saturday, June 11th.

Goal: Decide upon the key elements of our organization's new five-year strategic plan.

Outcomes: Based on our mission statement, develop a vision, clarify our values, and develop three to five key goals to pursue over the next five years.

Attendees: From our Board:

From our Staff:

From our Volunteers:

From our Supporters:

Our Outside Facilitator:

Decision-making: Everyone's feedback is welcome at the retreat, and together we will discuss and recommend a vision and strategies for our future. Based on this input, the Board will use consensus to make decisions.

Lodging: A block of rooms has been reserved at the Fantastic Retreat Center in Nearby Mountains, CA. Please speak with Contact Person at Phone Number or e-mail to confirm your attendance and reserve a room.

Friday, June 10

Travel from Los Angeles to Nearby Mountains, CA

7 p.m. Optional dinner at Restaurant in Nearby Mountains.

Sample text: "For those who can make it, we'll share a meal together and use the time to catch up, socialize and get to know each other better."

Saturday, June 11

9 a.m. Breakfast and gathering.

Sample text: "Breakfast is available at the hotel and in several other nearby venues."

10 a.m. Welcome, Introductions, Agenda Overview.

Review of ground rules and decision-making process.

10:15 Review Mission Statement.

Consider including the written mission statement in the agenda itself so participants have it easily accessible.

10:20 *Sharing Assessments.*

Information can be shared in many ways: oral presentations, video, handouts, PowerPoint, and more.

11:00 *Develop Vision and Values Statements.*

Whatever it is your organization needs to develop, make sure you're clear about what type of statement you're crafting. A vision statement describes what the world will look like in 10 or 25 years after your organization has been wildly successful. A mission statement describes the work you do, while your values help guide the work you do. If you're starting from scratch and working on multiple documents, you might do some large group brainstorming, or break into small groups to draft language, to be followed up by large-group discussion in the afternoon.

12:00 *Lunch*

1:00 *Finalize Vision or Values Statements*

Continuing the process started before lunch, the group will sort through and discuss the ideas generated to come to a decision.

2:00 *Development of long-term goals*

A goal is a clear, measurable accomplishment you want your organization to complete. Consider altering the method you use to generate ideas here from that used in the morning. More physical methods of brainstorming (for instance, gallery walks) can be great options for the afternoon after a full morning of discussion.

4:00 *Development of objectives for each strategy*

Objectives are specific steps your organization will take in order to accomplish your goals.

5:30 *Next Steps, Wrap up, Evaluation*

Assign follow-up tasks and complete evaluation.

6:00 *Adjourn*

7:00 *Optional dinner*

Name a restaurant on way back from retreat center.

For more resources to help your organization, and for information on outside facilitation services for retreats, strategic planning sessions, and meetings, please visit ronmilam.com.