

A Guide to Planning and Conducting Successful Retreats

Edwin C. Thomas, Director
Governmental Research and Service
Institute for Public Service and Policy Research
University of South Carolina

This brief guide was written to help governmental managers, council members, and board members plan and conduct successful retreats. Organized as a series of answers to frequently asked questions, the information in this guide is based on years of experience in planning and facilitating retreats for governmental organizations. The guide includes a retreat planning checklist, and a listing of keys to a successful retreat.

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1. What is a retreat?

A retreat is a meeting that is typically designed and organized specifically to facilitate the ability of a group to step back from their day-to-day demands and activities for an extended period of concentrated discussion, dialogue, and strategic thinking about the organization's future or about specific issues.

2. Why hold a retreat?

There are as many reasons for doing a retreat as there are issues and challenges facing an organization. Among the most common uses of retreats are:

- Strategic planning
- Budgeting
- Discussion of specific issues or challenges facing the organization
- Team building
- Problem solving
- Development of annual goals and objectives

- Orienting new members

3. Where should a retreat be held?

This is a challenging question for many organizations. Ideally, a retreat is conducted away from the normal workplace. The reasons for this are straightforward:

- Retreats are hard work and require long periods of intense, uninterrupted discussion
- Participants are less likely to be interrupted by phone calls and staff members if they are away from the office
- Participants can better focus on the topics under discussion
- Participants are more likely to stay for the entire time
- Being “away on retreat” creates an atmosphere that is more conducive to teamwork, creative thinking, and consensus building

Many governmental organizations are sensitive to holding meetings outside of their normal place of business. Citizens may criticize such meetings as efforts to “hide” from public scrutiny. There may also be criticism because of the cost of the retreat. Obviously, if a governmental organization enjoys a good relationship with the press and its citizens, such criticism is minimal.

It is usually possible to find a good retreat site within your city or county boundaries. Banks often have meeting rooms that you could use. The public library may be a good location. Local hotels have boardrooms or small meeting rooms that make good retreat locations. But the drawback to meeting close to home and office is the increased likelihood that participants will arrive late, leave early, or be interrupted by routine, day-to-day demands.

4. Are retreats subject to the Freedom of Information Act?

Yes! It is critical to remember that retreats are public meetings which are subject to the provisions of the FOIA like any other meetings. Council retreats have to be advertised like any other meeting of council.

Reporters will often attend some portion of the retreat. It is a good practice to provide them with briefing materials so that they can follow the discussions and more faithfully report the results. Most press reports of retreats are very positive.

Occasionally, citizens will attend retreats as well. Certainly they are entitled to attend since these are public meetings. Generally, space is limited, so you don’t want to invite the public. And while this is a public meeting, it is not the public’s meeting. Guests are generally not allowed to participate in the discussions. After all this is a retreat. It is not a council meeting, a public hearing, or a staff meeting.

5. How often should we hold a retreat?

The answer, of course, depends entirely on the organization and the issues it may be dealing with. As a general rule, it is good practice to conduct a retreat on an annual basis to consider the strategic direction of the organization, to prioritize the issues it faces, and to set goals and objectives for the year. Generally, time is set aside to review progress on the past year's goals as well.

It is also a good idea for council to hold a retreat whenever new members are elected. Retreats are an excellent way to orient new members to the issues and to lay to the groundwork for effective teamwork and communications among the members.

6. How long should the retreat be?

This depends on the purpose of the retreat. Many retreats are planned for a day or a day and a half, with some social time built in. A typical retreat agenda might look like this:

Day One

9:00 – 9:30 a.m.	Welcome, Introductions, Overview of Purpose, Groundrules
9:30 – 10:15 a.m.	Discussion
10:15- 10:30 a.m.	Break
10:30 – 12:00 noon	Discussion
12:00 – 1:00 p.m.	Lunch (provided)
1:00 – 2:15 p.m.	Discussion
2:15 – 2:30 p.m.	Break
2:30 – 4:00 p.m.	Discussion
4:00 – 4:15 p.m.	Break
4:15 – 5:00 p.m.	Summary of Days Discussions, Review of Agenda for Day Two
5:00 – Until	Dinner and Social Time for the Group

Day Two

7:30 – 8:30 a.m.	Breakfast (provided)
8:30 – 10:00 a.m.	Discussion

10:00 – 10:15 a.m. Break

10:15 – 11:30 a.m. Discussion

11:30 – 12:00 noon Wrap-up and Review of Action Steps

This agenda provides sufficient time to for in-depth discussion of the issues under consideration. In addition, it provides time during meals and the evening social time to allow the participants to get to know each other outside of the normal work setting. This facilitates the development of trust and teamwork. In some cases, organizations invite spouses to the evening social events. Often participants enjoy the opportunity to cookout or barbecue as the highlight of the evening's social event. Participants may want to plan a covered dish supper. This can cut costs and increase camaraderie and team spirit.

7. Do I need an outside facilitator?

Most organizations can benefit from using an outside facilitator for their retreats. An experienced facilitator can help you plan the retreat, develop the agenda, and set realistic goals and expectations for the session.

During the retreat the facilitator manages or “facilitates” the group discussion. Facilitators are not generally experts in the specific issue or issues you may be discussing. That is the role of the participants. Facilitators are experts in group dynamics, group processes, team building, decision making, and consensus building.

The facilitator should have no particular stake or interest in the issues being discussed. Their sole interest is in helping you have a successful retreat.

It is difficult for a retreat participant to serve as the facilitator. Participants, if correctly selected to attend the retreat, do have a stake in the outcome of the discussions. This interest makes it very challenging for them to also serve as a neutral group facilitator.

In addition to helping you plan the retreat before hand, and managing the group discussion during the retreat, the facilitator will generally function as a recorder for the group by capturing the key points on a flip chart or on computer. The facilitator will generally provide the group with a written report summarizing the discussions, any decisions that were made, and action steps to be taken.

8. Who should attend the retreat?

The answer depends on the issues to be discussed during the retreat. As a general rule, those members of the organization who have an interest in the issues to be discussed should participate. As an example, if you are planning a council retreat, participants would include the members of council, the clerk to council, the administrator or manager,

and key management staff if needed as resources. The roles of the participants should be clearly specified before the session.

In the case of council retreats, occasionally one or more members may be resistant to the idea of a retreat for any number of reasons. Ideally, all members should participate. As long as the majority of members support the idea of a retreat you should go forward with it.

9. Ground rules

The facilitator usually outlines the ground rules for group discussion. A typical set of ground rules for a retreat would include:

- Success depends on the participants. Everyone should participate and express their ideas, questions, and concerns
- Participants must practice their active listening skills. Listen for understanding. Only one person speaks at a time.
- Be positive, non-judgmental, and open to new ideas
- Conduct a civil dialogue. Disagree without being disagreeable.

10. Setting up the room

The layout of the meeting room is critical to the success of the retreat. Group dynamics are linked to the ambiance of the meeting space. The room should be cozy but not cramped. There needs to be room for both the participants and the facilitator to move around easily.

There should be plenty of usable wall space to hang flip chart sheets.

The meeting table should be arranged in a “U” shape so the participants can see one another as they talk.

The facilitator will normally work from the open end of the “U”.

There should be coffee, water, soft drinks and snacks available during the meeting.

Equipment needs can range from the simple – a flip chart and markers, to the more sophisticated with computer projectors and automated decision systems. Keep it as simple as possible. Technology should not get in the way of discussion and human interaction.

It is essential that the room have comfortable chairs.

There should be plenty of paper and pencils on hand for the participants.

The room should have good HVAC and controls.

Make sure the windows have shades or blinds to control lighting and glare, and to minimize any distractions caused by the view.

Appendix A - Retreat Planning Checklist

Use the following questions to help you plan the retreat.

Purpose

1. What is the purpose of this retreat?
2. What criteria will you use to determine that the retreat was successful?

Participants

3. Who needs to attend the retreat?
4. Who supports the idea of holding a retreat?
5. Who is opposed to the idea?
6. Will all the key participants be able to attend?
7. How much time will they be willing to spend at the retreat?

Location

8. Where will the retreat be held?
9. Are the rules governing the use of the space acceptable?
10. Can the room be arranged as we want it?
11. Are the chairs comfortable?
12. Is there good control over lighting and HVAC?
13. Can we have food, snacks, and refreshments in the room?
14. Who will provide food, snacks, and refreshments?
15. Can we hang flip chart paper on the walls?
16. How will breaks and meals be handled?
17. Will overnight accommodations be needed?

Equipment

18. What equipment will be needed?
19. Who will provide it?
20. Who will operate it?

Facilitator

21. Do we need an outside facilitator?
22. Who will do it?
23. How much experience does the facilitator have with groups like ours?

Recording and Reporting

24. Do we want to record the meeting?
25. What kind of a retreat report we need?

Appendix B – Developing the Budget

These are typical budget items for a retreat:

1. Meeting space rental. It is often possible to find meeting space at no cost.
2. Equipment rental. For most retreats, equipment needs are minimal. In some cases the facilitator will provide their own equipment at no additional charge to you.
3. Supplies. Generally this involves only pens, pencils, and markers.
4. Breaks and Meals
5. Facilitator fee
6. Participant travel, room and board

Appendix C - Keys to a Successful Retreat

1. Good retreats, like any successful meetings, are no accident. They are carefully planned in great detail.
2. Use an experienced, skilled, facilitator.
3. Meet with the facilitator well in advance of the meeting to discuss the purpose and plan the agenda.
4. Make sure that the “right” people are willing and able to participate.
5. Clearly communicate the purpose of the retreat to the participants.
6. Make sure the room layout and setup is conducive to group discussion.
7. Make sure you have the equipment you will need, that it works, and that someone knows how to set it up and operate it.
8. Have plenty of coffee, water, and soft drinks available. Snacks are a nice touch and help the participants keep their energy levels up throughout the session
9. Make sure everyone knows the ground rules.
10. Keep the ground rules simple.
11. Clearly explain any group techniques, processes, and decision making tools you plan to use.
12. Use worksheets to facilitate group processes where possible.
13. Provide participants with background material and briefing papers prior to the retreat. Bring extras copies to the retreat.
14. Provide pen and paper for each participant.
15. Make sure you have a flip chart easel that is stable, along with plenty of flip chart paper and markers. It is easiest to use flip chart pads such as 3M[®] that will stick on a wide variety of wall surfaces without damaging them.
16. If you must record the discussion, arrange for a staff member to operate and monitor the recording equipment.
17. Make sure you are in compliance with the FOIA.