

PLANNING A RETREAT

“Never doubt that a small group of thoughtful, committed citizens can change the world; indeed it’s the only thing that ever has.”

– Margaret Mead

Some people delight in the thought of a retreat: a chance to reflect, enjoy some quiet time, bond with nature. An organizational retreat may bring different reactions: “We have to spend a whole weekend working?” Getting away from your everyday settings can be very beneficial in developing your team and sparking creativity. The content of your retreat—if planned effectively—can produce results you never dreamed of.

Preparation is the key. If your group members take an entire day or overnight trip away from their personal lives to benefit the group, it is not hard to imagine their reactions if it is not well-planned.

- Assess needs. The retreat committee should begin by assessing concerns, needs, problems and other items to be addressed through the retreat. Write these down. The programs and activities you choose will reflect these items.
- Set objectives and goals. What information should your members possess after the retreat? What skills? What attitudes? These objectives should also be documented.
- Determine activities and programs. Make sure they are consistent with the objectives you have set. Also consider whether or not the objectives are consistent with: member expectations, skill levels, available resources and materials, staffing availability and time and space allowed. Some activities you may want to incorporate include: team-builders, role-playing, brainstorming sessions, lectures.
- Make the arrangements.
 - Budget. Remember to include facility cost, materials, equipment, copying, meals, refreshments, recognition (e.g. certificates), travel, outside presenters.
 - Date/time. Allow members sufficient time to work the retreat into their schedules. Consider the amount of time needed to achieve the goals and objectives of the retreat.
 - Facility. Make reservations. Your space should have enough room to conduct activities. You should be comfortable without a lot of distractions.
- Delegate. Develop a checklist of tasks to be completed and by whom. Prepare programs and activities. Generate a detailed action plan such as the following:

Need	Time	Activity	Objective	Who
None	9-9:30am	Icebreaker	Get to know you	Jeff
Handouts	9:30-11am	Motivation	Knowledge	Michelle

- Promote. Talk up the retreat and get members excited! Let them know the goals, agenda, reason it is important and that it will be fun.
- Act. Arrive at the facility with plenty of time to prepare. Make sure all leaders and

presenters have agendas.

- Evaluate. Have members assess the effectiveness of the retreat: Was it well planned? How did they like each activity? Did it meet their goals/expectations? Were skills learned useful? Suggestions for next time?
- Follow up. Send thank you notes to planners and presenters, pay bills, summarize evaluations, note suggestions for the next retreat.
- Progress check. Three to six months later, evaluate the group's progress since the retreat.

When planning the details of your retreat, keep in mind a few other items:

- Allot time for breaks. Give members a chance to chat, play games, read, sleep.
- Have a variety of activities.
- Make your retreat goals clear. More specific goals lead to a more structured design, which ultimately leads to a more effective retreat.
- Make learning fun. A retreat with nothing but lectures might not be very successful in inspiring or motivating your group.
- Allow social time and activities geared towards getting people comfortable with each other.

Reference:

Gresham, S. (1991). Steps for Planning an Organizational Retreat Western Illinois University.

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