

## Tips for Your First Retreat

### 1. What will you focus on?

- a. The coordinators of the retreat, the president, and/or the executive board members should work together to plan the retreat. Don't leave it up to just one or two people.
- b. Identify any concerns, needs, and outcomes that you can use during the retreat – you'll need to think about the best format to keep your members involved, interested, and informed.
- c. There are two methods which can help determine what types of activities and programs you will use:
  - i. Problem solving – focusing on immediate problems of the organization
  - ii. Competency – focusing on possibilities and outcomes (where are we now...and where do we want to be?)
- d. Involve your advisor, other members, and/or a facilitator to help assess what topics you should focus on...and to help discuss weaknesses and/or strengths you should explore.

### 2. Setting goals and objectives of your retreat

- a. Use your information on your organization's needs to help you set your goals for the retreat. At the end of the retreat, what do you hope your members will have learned?
- b. Goals and objectives should be broken down according to the types of learning you are focusing on:
  - i. Knowledge learning – what information participants possess after the retreat (constitution, policies, organizational goals, etc.)
  - ii. Skill learning – what skills should participants possess after the retreat (time management, planning and programming skills, confrontation skills, etc.)
  - iii. Attitude learning – what attitudes should participants possess after the retreat (group cohesiveness, optimism, respect, team work, etc.)

### 3. Organization of the Retreat

- a. Determine the activities, content, and programs which will help you accomplish your goals for the retreat.
- b. Select the topics and methods to be covered. Consider the following factors:
  - i. Will the topics and methods meet your goals for the retreat?
  - ii. Are the topics consistent with your members' expectations, skills, and knowledge level?

- iii. Are there any resources, materials, and students/staff/advisors/mentors available for the topics and methods selected to be covered?
- iv. Is there enough time and space available to accommodate the topics and methods selected? If not, how should you alter your retreat? Do you have mini-retreats to cover all the material? Do you choose your top priority goals and discuss the other topics informally during a few normal organization meetings?
- c. Examples of possible methods and topics: (not a complete list)
  - i. Team building exercises – develop group cohesiveness
  - ii. Lecture and/or interactive presentation – education on organization’s constitution, policies, position responsibilities, event planning
  - iii. Role play – confrontation skills
  - iv. Brainstorming – goal setting, program planning

#### 4. Make Arrangements

- a. Logistics – This step includes the practical planning such as money, time, staff availability, physical space, equipment limitations, size of the group involved, etc.
- b. Budgeting – Factors to consider:
  - i. Facility cost
  - ii. Materials, copying, and equipment
  - iii. Refreshments and/or meals
  - iv. Recognition, certificates, etc
  - v. Outside presenters
  - vi. Travel
- c. Selecting the Date and Time
  - i. The needs and expectations of your members/attendees should be taken into consideration.
  - ii. There must be sufficient time to achieve your goals and objectives of the retreat.
  - iii. You should notify your members/attendees of the date and time with sufficient notice so they can make arrangements in advance.
- d. Choose the Facility
  - i. Area and space should be appropriate for your activities and programs.
  - ii. Ensure that you meet somewhere that will help people focus on your activities (i.e., an outdoor location might be nice on a warm day for your teambuilder, but it will not be a good space to learn about the Constitution. Your usual meeting room might be fine for weekly meetings, but you want your members to be in a different frame of mind than “business as usual” when you’re at a retreat. Think about what you want to accomplish and choose the best settings for the various sections of your retreat.)
- e. Designating Responsibilities

- i. Designate planning responsibilities to other members of the committee planning the retreat.
- ii. Request assistance from presenters and facilitators from outside your organization.
- iii. The preparation of activities and programs should be completed by members helping with the retreat.
- iv. Develop a checklist of tasks to be completed, by whom, and when.
- v. Develop a step-by-step plan of action (brief example)

<u>Time</u>	<u>Activity</u>	<u>Objective</u>	<u>Responsibility</u>	
<u>Equipment</u>				
10-10.30	Open/Icebreaker	Attitudes	John Smith	None
10.30-11	Goal Setting	Knowledge	Jennifer Jones	
<u>Handouts</u>				
11-12	Lunch	Attitudes	Betty Brown	Food

- f. Promotion of the Retreat – It is essential that you publicize the retreat and inform your members of the agenda, goals of the retreat, and communicate the importance of the retreat – not to mention how much fun you will have!

#### 5. Execution of Retreat

- a. Setting up the process:
  - i. Confirm responsibilities with planning committee to make sure all tasks are completed.
  - ii. Allow a sufficient amount of time to arrive ahead of beginning time to set up and organize material, equipment, refreshments, etc.
  - iii. Provide a plan of action for all retreat organizers and presenters to refer to during the program.

#### 6. Evaluation

- a. Create a survey or two and listen for informal feedback during the retreat. Your evaluation of the retreat should provide you feedback on:
  - i. The planning process (by members who organized the retreat)
  - ii. Each activity component of the retreat (by participants)
  - iii. If the goals of the retreat were met (by participants & organizers)
  - iv. Usefulness and applicability of activities (by participants & organizers)
  - v. What should be changed next time? What still needs to be focused on throughout the next few meetings....or the rest of the year?

#### 7. Follow-up

- a. Thank you's for everyone who helped create and organize the retreat
- b. Thank you's for all your presenters and facilitators outside of the organization
- c. Pay any bills

- d. Review and summarize the evaluation results
  - e. Organize evaluation report to share with organization members
  - f. Analyze the issues and ideas developed at the retreat
    - i. How are ideas going to be implemented?
    - ii. Will goals of the organization be met? Are they being met?
    - iii. Are skills (cognitive, behavioral, affective) being utilized within the organization?
    - iv. Use information from follow-up in the planning process for the next retreat
8. Things to think about...
- a. Allow sufficient time in the planning process
  - b. Establish clear retreat goals – the more specific the goals and objectives, the more explicit the design, with a better chance of meeting the needs of your group
  - c. Maintain variety – vary the time, amount of “risk”, presentation styles, presenters (even year-to-year you need to mix up your presenters), settings, and the type of interactions during the retreat
  - d. Be creative – this will create interest and facilitate further involvement and interaction of your members
  - e. Involve the group – it is important to involve the group in activities and programs. The more active your members, the great their interest and learning!
  - f. Allow for breaks
  - g. Your member will learn best when they can experience and practice
  - h. Learning can and should be fun
  - i. Individuals will take greater risks in group situations if the group is supportive – this will increase the number of ideas and suggestions members will make.
  - j. People seldom learn the first time – new ideas are learned while building on the old (sequencing and reinforcement)
  - k. Incorporate socializing into the overall program
  - l. Integrate recognition into the retreat (certificates, awards, prizes, etc)
  - m. For more suggestions or ideas, seek the advice of professionals, mentors, advisors, and/or other student leaders