

Retreat to Advance



*The Why's, How To's and Ah-Ha's
of Planning
Your Board Retreat*

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The Case For Retreats

Why We Bother



Retreat: A gathering of key chapter leaders that is off-site and separate from your normal board meetings. A blend of work and play.

There are many benefits to staging a retreat at the beginning of each chapter year. Among them:



- ◆ Strategic planning opportunities
- ◆ Articulate a vision for the year
- ◆ Chance to sort out roles and responsibilities
- ◆ Continuity: transition and/or blending between predecessors and successors
- ◆ Get to know each other informally
- ◆ Skill-building opportunities
- ◆ Ritual: A Ceremonial Beginning
- ◆ Appreciate differences in learning styles, communication styles, leading styles, etc,
- ◆ Model teamwork for others
- ◆ Set tone for the year
- ◆ Identify special needs, potential problems in advance
- ◆ _____
- ◆ _____

Considerations

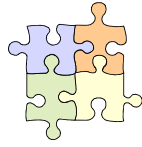
- ◆ Just board vs. board + key leaders
- ◆ In town vs. out of town
- ◆ Chapter underwrites vs. co-pay
- ◆ No nights/one night/two nights...
- ◆ Led by insider / outsider
- ◆ Each participant a presenter
- ◆ Sharing rooms
- ◆ Degree of structure vs. unstructured:
Mix of Focus vs. Fun

Items to Address During Retreats

- ◆ Schedule for Board Meetings, conference calls and reports
- ◆ Budget
- ◆ Programs
- ◆ Expectations and goals for year
- ◆ How to build committees & teams
- ◆ Dispute resolution
- ◆ Brainstorming
- ◆ Themes and campaigns

Stuff That Works!

Pieces to your Retreat



◆ Pieces to your Retreat: Fun with Focus:

- Ice breakers
 - Team-building activities,
Brainstorming
 - Partnering activities
 - Problem Solving
- ◆ Free time
- ◆ Benefits of bunking



◆ Skill builds:

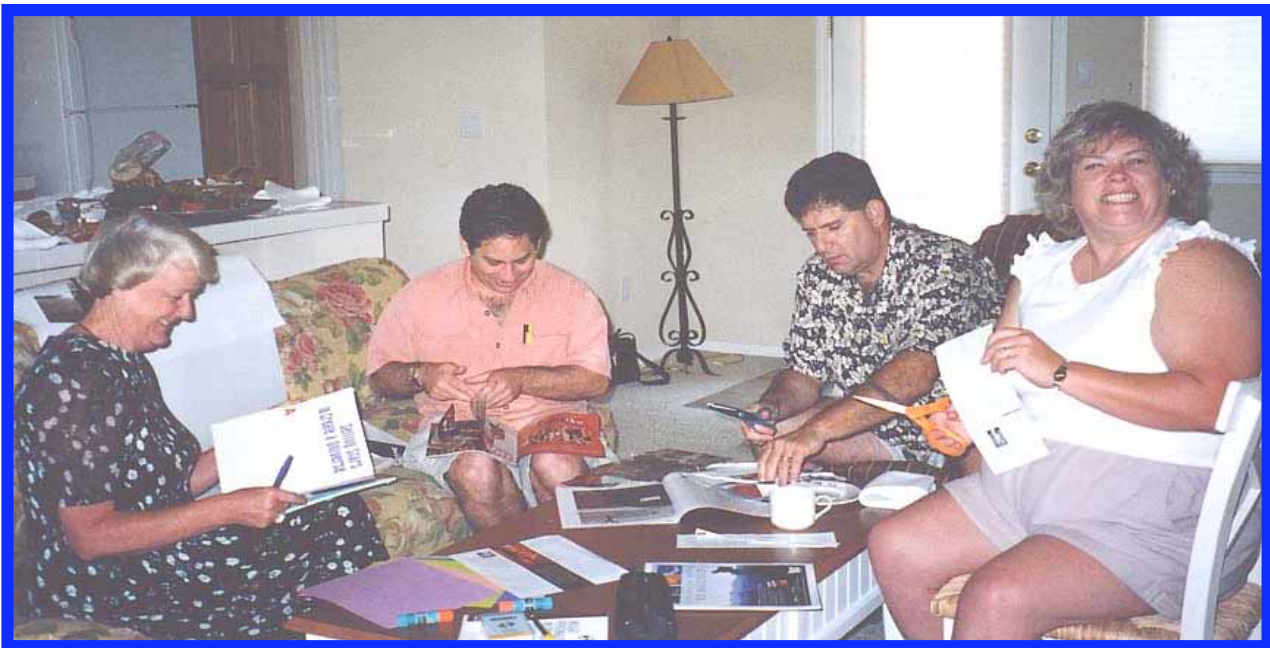
- Recruiting board members,
committee members,
guests
 - How to promote your
chapter
 - Handling gossip
- ◆ Facilitator and scribe
- ◆ Action plan
- ◆ Going public with results
- ◆ Nature component (value of solitude)

Recommendations



- ◆ Identify dietary restrictions in advance and plan accordingly
- ◆ Seek opportunities for carpooling (good for teamwork and the environment)
- ◆ Set expectations prior to arrival so tone, protocols and objectives are clear
- ◆ If soliciting input in advance make sure to indicate if responses are held in confidence vs. shared.
- ◆ Bring a camera or videocam!
- ◆ Celebrate occasions that coincide (birthdays, anniversaries, etc.)
- ◆ Talking Stick not a bad idea!
- ◆ E-mail nsa@craigspeaks.com for a free PDF of Craig's "Ice Breakers for Speakers and Trainers" you can use for your next retreat





Budget Considerations

Rates vary by location, number of days, number of attendees and level of extravagance. Consult your budget and treasurer, as well as your local Convention & Visitors Bureau for recommendations within your budget.

Likely expenses can include:

- Room
- Board
- Supplies (flip charts, markers, etc.)
- Facilitator
- Munchies

Stuff to Bring:

- Fun Stuff (musical instruments, tchockies, etc.)
- Disposable cameras
- Mood music for different activities (game show themes, instrumental music, etc.)

Photos (top to bottom): Collage session; Explaining collages; It's over!