

Annual Retreats, Part 2: How to plan a successful retreat

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Producing a long list of issues to learn about or discuss at a retreat is easy. Crafting an agenda that will generate effective discussion, decision-making, and follow-through, however, is a more complex task.

Be thoughtful when developing the plan As the retreat planning committee progresses through its work, consider the following topics:

- What are our objectives for our time together? Would others agree or hold differing opinions?
- How should the time be structured in order to meet those objectives?
- In order for group members to be fully informed for future decision-making, how much and what kinds of information should be presented? How should the information be presented, and by whom?
- Is this a one-time event or part of a series of meetings designed to help the group continue this line of work or improve its functioning over time?

More often than not there are multiple purposes being served by holding a retreat. Careful thought and planning is needed in order to prioritize the purposes of the retreat and to design a sequence and timing for the activities. It is important to be purposeful and realistic about allocating the group's time. An experienced facilitator can be helpful with this task.

Alternatively, if the group decides to conduct the retreat using only internal resources, [additional useful guidance is available here](#).

An opportunity to strengthen working relationships and processes Focusing on getting tasks accomplished -- making decisions, establishing plans, etc.-- is important, but retreats also offer a chance to assess how well the group actually works together. Ineffective working relationships, practices, or behaviors can stymie a group or otherwise hinder the desired accomplishments.

Planning an agenda that meets your group's needs is best done by considering not just what the group wants to accomplish together, but also how they want to act with each other. This is a chance to pay attention to the relationships and the dynamics within the group.

Here are some circumstances that might warrant dedicating part of the retreat's focus to

strengthening working relationships:

- Have there been changes in the groups' informal or formal leadership that might affect previously understood and established routines?
- Is there uniform clarity on handling regular procedures, such as how items get placed on an agenda or how rules of order are used in formal meetings?
- Are there uncomfortable group dynamics that are hampering the group's success?
- Is there a new employee or appointee who might be unclear about any of the group's expectations?
- Are relationships with other organizations, community leaders, or neighboring jurisdictions inconsistent with or detrimental to the group's work process or goals?
- Are incomplete, indirect, or misunderstood communication patterns disrupting effective working relationships?

All these questions are part of the pre-retreat planning that the School of Government suggests is a good practice. These conversations, conducted with a subset of retreat attendees, help everyone focus on defined objectives by clarifying the work that needs to happen in advance of or during the retreat. This is an investment in planning time that pays off with an efficient retreat agenda and successful outcomes.

In **Annual Retreats, Part 3**, we will explore what you can organize and implement the work you generate during your retreat.