

# **THE WHY, WHEN, AND HOW OF SUCCESSFUL RETREATS**

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# INTRODUCTION

Recently, one of our clients posed a question we've heard many times. "I'm new in this leadership role, and I'm thinking I should get everyone together for a retreat," she said, "but I'm just not sure. What do you think?"

As consultants supporting organizations working for social change, we've led hundreds of retreats, and we're big fans. In fact, retreats might be our favorite thing to do. But not everyone feels this way. We've heard many tales of retreats gone wrong, leaving participants retreat weary and wary.

Retreats are powerful when they bring the right people together at the right time for the right reasons with the right process. Retreats allow us to step away from our daily responsibilities and see each other, our assumptions and our work with a wider lens and a different perspective. Retreats can enable us to access different parts of our hearts and minds, create new curiosity, generate momentum and good will, and move our work forward in powerful ways.

But sometimes having a retreat works, and sometimes it doesn't. What's the difference between time well spent and time misspent? What makes a retreat worth the considerable time, energy and expense it demands? We've set out to answer these questions here. In doing so, we've created a guide that will help people like our client decide whether to have a retreat, and then create vibrant and dynamic retreats that have positive organizational reverberations long after participants return to their daily routines.

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## What Makes a Retreat Different?

- Laying aside daily business
- Conducting extraordinary business
- Being fully present
- Stepping back, taking stock, thinking more broadly
- Sharing a sense of hallowed time



## SHOULD YOU RETREAT?

If you've identified a clear and significant purpose for a retreat, you are off to a great start. If you have a hunch that a retreat might be a good thing, but you aren't sure, take the time to see if you can find a compelling purpose. When clients come to us with general interest in a retreat, we work together to determine if a retreat is a good choice right now. This decision depends on whether we can identify a meaningful purpose. If you can't find a clear purpose, don't retreat!

### What's your focus?

A retreat is a great tool when a group has something important to work on together. Strategy development, conflict resolution, working agreements, a new initiative or action planning are all excellent opportunities for retreats. With a clear focus, a retreat can be an opportunity to innovate, see new possibilities and envision the work of an organization in new and refreshed ways. Retreats can also build organizational muscle for strategic and creative thinking that can be carried back into daily work. A retreat can be an opportunity for taking stock, reflecting together, assessing and refining practice, and providing a turbo boost to specific aspects of work.

While a retreat provides a break from the narrow lens of everyday life, it does need to be fully connected to your organizational work. What you bring to the retreat and what you take away should be part of a whole. Retreats are neither separate from your work, nor an end unto themselves; rather, a retreat should move you forward from your status quo.

At the same time, a retreat won't move *everything* forward. We've often seen clients put all their hopes into one retreat. To exaggerate only slightly, we've seen organizations try to develop strategy, work through structural questions, refine a problematic program, resolve areas of tension, build skills and plan an annual event in a single day! Retreats can backfire when expectations are too great or the topic at hand actually requires a longer-term process. On the other hand, we've seen clients err too far in the other direction, with retreats whose agenda looks like a regular board or staff meeting--just longer, and off-site.

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## What about relationships?

We want to make a particular note about “teambuilding.” When people make a commitment to spend time together, it can change the way they relate to each other and their work together. A retreat affirms that your shared work is important enough for the investment of significant time and energy.

Sometimes teams or organizations simply need time to play together. This doesn’t necessarily mean they need a retreat. Interacting with colleagues outside of the work environment builds a social foundation of good will. For this purpose alone, we might suggest that rather than a retreat, you plan a night out or what we call an away day, so colleagues can play together with no work agenda. Of course work retreats can--and should--involve play and laughter, but that shouldn’t be their sole purpose.

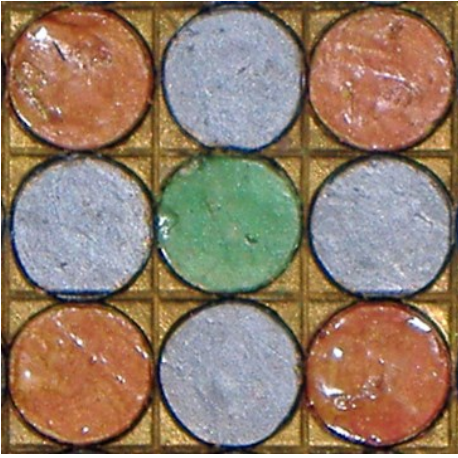
Retreats can be useful when interpersonal relationships need to be better aligned toward an organization’s core work, or better developed so that colleagues can think and plan together more successfully. In other words, a retreat can be highly effective for supporting team building with a purposeful connection to the work.

Retreats can also be helpful for attending to issues that are impeding working relationships. However, while retreats can be useful forums for working through conflict, they’re not the place to address serious interpersonal difficulties between particular individuals. If only a handful of people on the team have an ongoing issue, it’s generally not a good idea to engage the whole group in a conflict resolution process. It’s especially important to take conflict resolution outside the full group if it involves people in leadership roles.

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### **Don’t Retreat (yet) if....**

- You have serious tension between individuals or leadership that needs to be addressed before the whole group can work together effectively.
- Your proposed agenda looks like an extended regular meeting.
- You don’t have special topics that require space and time for consideration.
- You can’t narrow your focus.
- Your organization will be drained by the human or financial resources a retreat demands.



## PLANNING AND PREPARATION

A successful retreat requires more than the right reasons and a meaningful purpose; it also takes thoughtful planning and preparation. You're already taking time away from work to retreat, but that time probably won't be well spent unless you invest in preparation. Identifying the right activities and conversations and preparing everyone to participate is itself time well spent.

### Who should plan?

We encourage our clients to form a retreat planning team. Working with the person or people responsible for the retreat, this team can help clarify the retreat's purpose, identify or refine its desired outcomes, and develop its agenda. Engaging multiple perspectives enhances the content and process of the retreat, ensuring that it truly meets the needs of participants.

A planning team also builds ownership, generating a body of individuals who support the retreat's agenda and feel responsible for its success. This is especially important for organizations with low trust. The planning team can begin to build trust both through its own conversations and by thinking about how best to have conversations with the larger group.

In planning, as in all aspects of a retreat, decision-making authority should be clear. Is the planning team the final decision-maker, or will they only make a recommendation?

### Who should come?

We believe in inclusivity. Retreats are designed to bring out the best thinking of the group, so you want the best group possible! Think about who would add value to the conversation, as well as who would gain value from being there. If it's a board retreat, is there benefit to inviting key staff? Or vice-versa? If it's an all-staff retreat, don't forget about those whose voices are often marginalized: interns, support staff, volunteers, etc.

At the same time, extraneous participants benefit no one. If people don't have a vested interest, don't have wisdom to contribute, and there's no need to build their buy-in, it may not be useful for them to attend the retreat.

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## How long should your retreat last?

Several factors go into deciding on the length of a retreat:

- Most importantly, what do you hope or need to accomplish? The timing of a retreat should be commensurate with its purpose and the time required to achieve its goals.
- How much time can people spare?
- Where will the retreat be held? If participants are traveling a long way to get there, the retreat should be worth the time, expense and carbon footprint. However, don't extend the retreat unnecessarily just because people have travelled far.

## Where should you have your retreat?

The location of a retreat can help determine its success. Here are some important considerations:

- Off-site is better. Much better. Getting out of your typical environment helps you escape daily work and the temptation to “just get a little work done.” Be careful, however, that travel, expense and being away from home do not create new burdens for participants.
- When appropriate, stay overnight. Something magical happens when people have the chance to sleep on their work, wake up, and continue working together.
- If you do stay overnight, make sure you have appropriate accommodations. What level of comfort does your group expect? Do people want to share rooms?
- Find a location that feels special and out of the ordinary. Just being together in a nice environment will open up your brains and hearts. A good retreat space is comfortable, with room to move around. It should support the release of creativity and emergence of new awareness.
- Make sure you know your budget considerations before you start considering locations.

## How should you prepare participants?

Everyone should come to a retreat with an understanding of its purpose, agenda and desired outcomes. Expectations should be clear and shared. If people come to the retreat wanting to have conversations that are not part of the agenda, frustration can build and the retreat can easily fall apart. Such disruptions can be prevented if you communicate effectively with

participants before the retreat. If appropriate, the planning team can poll participants as part of developing the agenda to hear their hopes and expectations.

Send out relevant information—including the agenda—and specific questions well in advance, with ample time for people to read them. Don't send out so much information that people feel overwhelmed before the retreat even begins, or are so daunted that they don't read anything. Do send exactly what they will need and no more, so they are inspired and excited to begin the work. The advance materials and communication help to create the mindset with which people enter the retreat.

### **Who will do what?**

Clarify retreat roles in advance (this can be part of the planning team's work). Questions to consider include:

- Should you use an outside or internal facilitator(s)?
- Who will handle logistics?
- Will different people lead activities? Which activities? Who?
- If you're not using an outside facilitator, will you need to fill roles like timekeeper, recorder and data manager?

If you identify these roles ahead of time, people can come prepared.

The decision-making responsibilities of the retreat body should be clarified before the retreat. Are the retreat participants making decisions or recommendations? Will decisions be made by consensus or majority? In our experience, well-facilitated groups can almost always achieve full agreement, but decision-making procedures should be established in advance.

### **How can you prepare for after the retreat?**

A retreat should have a tangible and significant impact on your work. If you start to prepare for follow-up before the retreat even begins, you'll be more likely to see that impact. If you know what steps you will need to take, set up structures ahead of time to ensure that your good ideas and hard work translate into concrete results once you are back at work. If you don't know what will emerge from the retreat, build planning time into the agenda so you can develop your next steps together. Without careful attention to what happens next, a seemingly successful retreat may end up, in hindsight, looking much less so.

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## THE KEY INGREDIENTS

### The right agenda

A successful agenda, prepared before the retreat, is crucial to a successful retreat. Components of a good agenda include:

- **Desired outcomes** that are appropriate and clearly articulated.
- **Activities and processes** that are directly or indirectly geared toward achieving your outcomes.
- **Meaty discussions.** Retreats should be opportunities for real thinking, not data dumping or rubber-stamping.
- **Interactive, generative, dynamic processes.** Find ways to get creative juices flowing by using different formats for conversations, as well as artistic or kinesthetic activities.
- **Fun.** Fun is important, but remember that people have different definitions of fun. Make sure your activities work for the entire group and/or give people multiple ways to connect and enjoy. The best activities will be connected to your purpose and desired outcomes.
- **Flow.** Have activities and topics build on each other, rather than abruptly skipping around.

### Retreat Planning: Key Points

- Involve a practical and appropriate number of people in planning. Have a committee develop the agenda to create buy-in and ensure that the retreat goes in the right direction.
- Develop clear retreat goals and outcomes that are tied to important organizational work.
- Prioritize outcomes. Don't expect to address every organizational issue in one retreat.
- Schedule the retreat for a time and place that makes it as easy and enjoyable as possible for everyone to participate.
- Prepare participants by providing information and sharing expectations in advance.
- Anticipate post-retreat follow-up before the retreat.



- **Space.** Allow time for new and unexpected things to happen (one of our clients calls this “white space”). Try not to cram in too many agenda items or rush through your schedule. Let things percolate. Be comfortable with discomfort. Even silence can yield rich results.
- **Relationship building.** This happens as we work together, but also in the “in-between” spaces at retreats—at meals, during activities that help us to get to know each other better, and hanging out in the evenings. Don’t overpack the agenda. Leave time for walks in the woods, coffee breaks and unstructured interactions.
- **Decisions and clear next steps.** Make sure the agenda provides ample time to attend to what happens next. As noted above, this will be easier if you have agreed to decision-making roles and processes in advance.

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Fidelity and flexibility are key to the successful implementation of your agenda. Plan to stick with your plan, but be flexible enough to accommodate the unforeseen—it might lead to your most positive results.

### **A conducive environment**

Here are some of the things that we find help create a good retreat environment:

- **Windows are essential.** The absence of natural light can feel limiting and exhausting. Also consider available wall space for hanging posters and other visual materials.
- **There’s no right way to set up seating,** but the easier it is for people to see, hear and interact with each other, the more good things will happen. Round is good. Comfortable chairs are essential.
- **Good food is a good thing.** When we’re well nourished and enjoy the pleasure of food together, it is easier to experience trust and creativity. Make sure to take care of special dietary needs.
- **Different materials can help participants relax and inspire their creativity.** Bring tactile objects to play or create with, note cards and markers for doodling or note-taking, and visual images for the walls. Play music during breaks.

## Good facilitation

As professional facilitators, we believe, not surprisingly, in the value of bringing in someone to guide the process of your retreat. An outside facilitator frees all participants to explore and engage fully in the process, rather than worrying about leading it. Ideally, this facilitator should be part of the planning process, so they can support that effort and familiarize themselves with the context and relevant issues.

A retreat facilitator creates and holds the space for generative thinking and connection. We do this by:

Facilitators make sure that all conversations are productive and help the group stay connected to its larger purpose.

- **Helping people stay on task.** It's easy to get lost in the details or follow a conversation down a fruitless path. Facilitators make sure that all conversations are productive and help the group stay connected to its larger purpose.
- **Creating space for people to express themselves,** and helping them hear each other. A facilitator can make sure that no one dominates conversations and everyone's participation is valued.
- **Managing time.** Facilitators keep the group from getting stuck on some agenda items at the expense of others. They also help conversations and activities start and finish within agreed-upon timeframes.
- **Tracking the energy of the group.** Using tools like energizers, movement, and different discussion formations (pairs, small group, whole group), facilitators help people stay engaged and not get stuck.
- **Making sure to take breaks**—and come back from them!
- **Managing a record of the proceedings.** A facilitator can capture the ideas, issues and decisions generated and make sure there's a record of the work.
- **Synthesizing and connecting conversations, ideas and perspectives.** Facilitators help groups see new possibilities emerge and find common ground.
- **Using different ways of communicating and considering information.** When we facilitate, for instance, we find that big colorful posters keep things lively and help visual thinkers see things in new ways.

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## AND AFTERWARDS...

It's frustrating to put time and energy into good work and have it all fade into oblivion.

It's important to leave a retreat with clear next steps and plans for connecting back, checking in and keeping the work alive.

It's important to leave a retreat with clear next steps and plans for connecting back, checking in and keeping the work alive. Make sure the notes from the retreat are consolidated into a full and accurate record and distributed to everyone involved. Keep track of the follow-up: bring retreat ideas into regular staff or board meetings, assign a group to follow up, make sure there's a plan for implementing every agreement that leaves the retreat.

Be sure to evaluate the retreat. What worked? What could have been better? What ideas do people have for future retreats?

How will you really know your retreat was worth it? When you enjoy the special time your team has together, do meaningful and productive work, implement your decisions and plans, and see your organization and its work become more successful!

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## ABOUT THE AUTHORS

Ora Grodsky and Jeremy Phillips are consultants who provide training and organizational development services to organizations working for social justice. They both live in the Boston area.

Ora co-founded Just Works Consulting with her husband Jonathan Rosenthal in 2000. Jeremy launched Jeremy Phillips Consulting in 2004.

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