

## Planning an Executive Officer Retreat

- Mandate that all officers attend the retreat, as it is an important time to build a working rapport with your fellow officers and outline goals for the semester.
- Do not limit attendance to only officers, allow all members to attend the retreat if desired. The more members involved in the planning and structure of your organization the better. This will increase their desire to actively participate in the organization if they feel as though their input and contributions are valued.
- Choose and announce the retreat date at least 3 weeks ahead of time to give members the ability to plan around that date.
- Determine the principle reason for having this retreat. Is it a transition period for your organization? Are there serious issues that need to be resolved? What do you wish to gain from this?
- Be certain that the timing of the retreat doesn't interfere with major organizational activities or academic deadlines (midterms, finals, ect.).
- Find a retreat location that allows members to direct their attention to the tasks on hand and eliminates outside distractions.
- Gather all necessary materials such as papers, pens, pencils, and a calendar.
- Create a budget for the retreat. Consult with the treasurer to confirm that there are monetary resources available for materials and accommodations.
- Set goals for the retreat; stay on track to ensure you reach all of your goals by the conclusion of the retreat
- Invite group facilitators to the retreat. Make sure to arrange for their audiovisual needs, accommodations, food, and transportation.
- Take breaks between each long discussion, so that members have time to collect their thoughts. If members seem frustrated, tired, or bored, implement a quick team builder to rejuvenate them.
- KEEP A POSITIVE ATTITUDE! Encourage informality and keep a sense of humor. Help everybody foster friendly differences of opinion if it occurs.
- Listen with respect to all ideas and stress what is important. Try to keep the discussion focused on the goals and objectives of the retreat and turn the discussion away from ideas that do not positively contribute to the discussion.
- Keep the event light-hearted and action packed, but remain focused at all times. Provide stimulating activities in between sessions
- Constantly thank members for their participation in the retreat. This will ensure high morale and positive attitudes throughout the retreat.
- Create a fun and positive activity to end the retreat
- Prepare an evaluation form for all attendants to complete, giving their thoughts on the effectiveness of the retreat, and what they will take away from it.

### Sample Executive Retreat Agenda

- I. Friday
  - A. Arrive and Unpack
  - B. Discussion- Purpose of the retreat
  - C. Dinner
  - D. Discussion- Camaraderie in the organization
    - 1. Open and unstructured
    - 2. Ice Breakers and games
- II. Saturday
  - A. Breakfast
  - B. Team Builders
  - C. Group discussion- issues and problems facing the organization
  - D. Evaluate issues and problems in small groups
    - 1. Discuss proposals and strategies for addressing issues and problems in form of goals
    - 2. Establish deadlines for the achievement of goals
  - E. Lunch
  - F. Budget Breakdown
    - 1. Future outlook/goals and objectives
    - 2. Club/Org Finances
  - G. Design a club/org calendar outlining important events (i.e social functions, community service, competitions, future retreats, ect.)
  - H. Review University and Organizational policies and procedures
    - 1. Dates and deadlines
    - 2. Proper forms
  - I. Dinner
  - J. Review committee structure, membership, responsibilities and purpose
  - K. Free time
  - L. Campfire discussion
- III. Sunday
  - A. Breakfast
  - B. Organizational bylaw review
    - 1. Proposed revisions
    - 2. Streamlining/clarifying sections
  - C. Discuss job descriptions and responsibilities of each officer
  - D. Lunch
  - E. Prepare for departure

