How to Plan an Effective Programming Board Retreat

By Roland N. Bullard Jr. and Clara Jackson

How can you possibly top last year's programming board retreat? In addition to accomplishing a lot of planning and assessment, it also featured fun and recreation, including water skiing and hanging out on the beach. You probably should ask the committee. Oh! You are the committee.

As you consider what you need to do to get started, you realize that many of the students involved in your board's leadership positions are new, while some have been involved since their freshman year. Nevertheless, it's your goal to give your board the best retreat ever that will meet the needs of everyone involved. But where do you start?
Focus on the overall mission of your group. From there you can decide if the group is meeting its mission and create retreat programs that will help the group achieve what it truly needs to achieve.

Returning members may need to learn new procedures, think "outside of the box," and recharge or refocus. These members may also need to redefine their relationships with each other. In addition, a retreat is a good time to help two members who don't work well together examine why they are having difficulty and find common ground.

When you are dealing with a mix of new and returning members, you will be facing all the previously mentioned issues as well as the need to balance the experience of returning members with the freshness of new members. The challenge in serving this mix is to impart information to new members without boring those who are returning. New members will also be learning the culture of the group and finding their place within it. It will be important to watch out for cliques among returners and new members—if your members don't thoroughly mingle, the opportunities to learn to work together as a team will be diminished. If faculty, staff, or advisors are present, you will also want to find ways to integrate them and help students feel they can trust them as part of their retreat group.

- Has there been a retreat before? What has been done in the past? Was it effective? What challenges did the group run into? What were the costs?

It will be important to look over the files of previous retreats to help find answers to these questions. The information you collect as you do this research can give you a starting point in planning the next retreat. Take care to avoid plan-
How to Plan an Effective Programming Board Retreat

...ning the retreat exactly the way it was done last year. Even if all of the members are new, you want to bring fresh ideas into the retreat. While you may choose to retain many of the same approaches that were used in the past, do not let that blind you to new goals or activities that can be implemented.

If there has been an evaluation or assessment of the group’s output (programs and activities), you can use that information to set the main goals for your new retreat. If your group already has a fairly strong bond, you may wish to focus less energy on team building and more on areas in which the group is deficient.

As for costs, have you adequately budgeted for the retreat? The amount of available funds may impact everything from the site and food you offer to any guest presenters you might bring in to speak to and motivate your board members.

**What resources are available for this retreat?**

This question can be answered in a variety of ways. The location of the retreat may offer you resources such as nature, a ropes course, a sports field or some other activity. The group members may have areas of special expertise on which you can capitalize by asking them to present workshops. Also consider which faculty or staff members would make valuable presenters. Can you enlist their expertise?

**Who should plan a retreat?**

While retreat planning may be the responsibility of one person, it often falls upon a retreat planning team. Planning a retreat with a team helps involve several constituents and incorporate a more diverse selection of ideas. A planning team should include advisors, supervisors and staff members who play an integral role within the group. Including students on the planning committee helps balance the administrative perspective of the group. The students bring their thoughts and ideas about what the group needs and how they best receive information. It may be important to include an academic perspective at the retreat, too, however, so asking a faculty member to be a member of the planning committee can be valuable.

**When should you hold a retreat?**

Another important aspect of preliminary research for a retreat is considering the date. You may choose to hold the retreat at the beginning, middle or end of the year. A retreat held at the beginning of the year serves to motivate and inspire the group. It is a good time to help group members bond. A retreat in the middle of the year serves to recharge or refocus the group. It can also help motivate them. Since the group has been working for some time, you will be able to see where they are experiencing challenges and address them at this time. An end of the year retreat is probably the least effective because there is no time to put into practice what is learned during the retreat. However, it is helpful in reflecting on the year, wrapping up unfinished business and saying good-bye to members who are leaving.

When thinking about the date, also consider busy times for the group. It is best not to schedule a retreat when a group is preparing for a major event because they may be distracted—events such as concerts, dances, step shows or homecoming should be taken into consideration. You also want to consider school and national holidays. Weather can also play a factor in the planning of a retreat. Weather that is too hot or cold can adversely affect a group participating in outdoor activities. And of course, if you are planning an outdoor retreat, always have a rain plan. (See Page A8 for an article on developing weather related contingency plans.)

**Location**

The location you choose can significantly impact the outcome of the retreat. There are usually two basic options for location—on campus or off. Both have benefits and drawbacks. Several factors affect the choice of location—goals, budget, time and resources.

**On Campus**

Holding a retreat on campus may be the most viable option for many schools and universities. It can be more cost-effective to use campus resources that are often available at little or no charge. Transportation costs would also be negligible because the campus is easily accessible to students as well as any other faculty or staff who might participate. Being intimately familiar with the location might also allow for more effective and complete pre-planning.

However, on-campus retreats may not always be ideal. With respect to any retreat, there is most often an expectation that you will be removed from the familiarity of the environment where daily business is conducted. Students and staff may not be able to detach themselves from their traditional ways of doing things if they are surrounded by their normal environment. Often a new loca-
There are a number of topics and activities that should be considered during the retreat planning process. They will vary based on your organizational needs.

**Off Campus**

An off-campus retreat can be an excellent mechanism for inspiring new thinking and fresh ideas. Being in a new location with new scenery often opens the mind to alternative points of view. Being off campus also helps isolate the group and encourage more intimate interaction that may not otherwise occur. Much of the success of a retreat lies within the strengthening of relationships between group members. The environment at an off-campus retreat can be controlled, cut down on distractions and allowing greater concentration. Off-campus locations may also offer more useful and active resources to the group. For example, locations that contain ropes courses, nature hikes, team building equipment and large spaces may allow more diverse or intense activities.

Of course, choosing to conduct a retreat off campus can be expensive. You have to consider the costs of transportation, sleeping arrangements and all that. Sometimes being off campus can be a action in and of itself. Students in a place may wish to explore the area opposed to concentrating on the retreat. Hosting a retreat in a city area also be distracting. Nevertheless, you want to get the group far enough away that they cannot easily drive back to their homes—as we mentioned previously, keeping the group together will significantly affect its bonding and concentration.

The site you choose may also need to be accessible to differently-abled students. In addition, faculty or staff may not be as inclined to dedicate a whole day or weekend that would be required for an off-campus retreat. They may be far more willing to come in for an hour or two and give a presentation on campus, than to dedicate a more significant block of time required for participating in a retreat that is farther away.

As you weigh these factors also take into consideration what goals you hope to achieve. Do you require intense concentration? Do you want group members to bond? Are you attempting to induce more creative thinking? What resources do you need to create the environment that you are looking for? Do you want more faculty and staff involvement?

As you can see, there are positives and negatives no matter which way you go. But with advanced planning and concise, well-defined goals, it is possible to control most of the challenges that come with whichever type of location you choose.
How to Plan an Effective Programming Board Retreat

Retreat Format

Your retreat format is intimately linked with its mission and location. Whether you choose to hold a one-day retreat, a weekend retreat, or a series of in-service training sessions, there will be many factors to consider with respect to format.

● One-Day Retreat

A one-day retreat can be highly effective in recharging a group—it can remind them of the board’s mission and why they are a part of the team. Also, the time commitment is minimal and it may be more cost-effective when considering the budget. If you choose this format, you want to limit goals to one or two items. This format is best for groups who have previously worked together, as little time will need to be spent building a team or acquainting members with each another. Instead, energy can be focused on what the team needs to accomplish.

A one-day retreat can also be a great opportunity to offer an intensive training in a particular area. For example, spending one day focused on creative advertising can bring out many new ideas for programming promotions. It can also allow students to focus on an area they might normally neglect.

● Weekend Retreat

Weekend retreats obviously require greater time and budgetary commitments, but they also allow group members to become better acquainted with each another. In fact, much of the “work” at a weekend retreat occurs through the “unscheduled” interactions of the group. Eating meals together, sharing accommodations and having the time to get to know each other become priorities. With this format, there is time to focus on more than one issue, but you should limit the goals of the group to three or four major areas in order to be most effective. For example, you may choose to concentrate on team building, advertising, new program ideas and effective paperwork. If you try to include too many items on the agenda, the students may become overwhelmed in spite of the fact that they have an entire weekend to work on these items.

Be sure to schedule several short breaks throughout the weekend as well as at least two larger breaks. Attention spans can become limited when session follows session. Therefore, if you want the information you presented to be appropriately processed, it is crucial not to overwhelm participants with too much information and too few breaks.

Also, seek variety in the style of each session and/or activity. For example, begin the morning sessions with a physical activity that energizes participants. Conversely, reflection and calming activities may be good at the close of the day.

When you are dealing with a mix of new and returning members, you will need to balance the experience of returning members with the freshness of new members.

Include physical activities between really long or intense sessions, but remember to allow time in the evenings for students to initiate their own bonding.

In planning retreats, some planners don’t consider the possible uses of travel time. For example, time spent riding a bus to a retreat site can be great for having participants discuss their expectations of the retreat. By the same token, the return trip can function as an overall wrap-up.

However, if you choose to use transportation time as part of the retreat schedule, it is wise to incorporate verbal activities rather than those that require reading or writing, which may result in motion sickness for some participants.

● In-Service Training

It may prove to be too difficult to get a group to allocate the time needed for a weekend retreat. When this is the case, there is the option of in-service training. An in-service workshop consists of an hour or two dedicated to a particular issue or goal. You may want to conduct a series of them throughout the year on various topics on which the group needs to focus. In-service trainings work best to resolve a group challenge such as initiating effective publicity or membership recruitment efforts. They can also be an effective tool for training the group on a new procedure or in handling administrative paperwork. Additionally, because they require a minimal time commitment, more group members are usually able to participate. The cost of in-service training can be virtually free. However, you might decide to provide snacks, bring in a paid presenter or purchase supplies. There will be some costs associated with these options.

Retreat Topics and Activities

There are a number of topics and activities that should be considered during the retreat planning process. They will vary based on your organizational needs. However, here are a few topics that most organizations should consider.

● Leadership 101

Leadership basics are essential to any programming organization. Whether you offer a refresher course for current leaders or a crash course on the subject for new leaders, leadership basics can serve as the foundation for the rest of your retreat. Some basics include time management, integrity and cultural appreciation. At many institutions, there is a leadership program track or an emerging leaders program in place. If such programs are available on your campus, they can be an excellent resource used in lieu of incorporating them into your retreat schedule. Students who participate in these programs typically will learn or hone the leadership qualities they need to perform well at the executive level of a student organization.

● Team Building

Retreats and the concept of team building have almost become synonymous for many campus organizations, because team building is very often the goal of organizational retreats. One of the great things about team building is that there are many resources available on the subject. Therefore, you should have no problem finding appropriate team building activities. Just be aware of your audience’s composition and remember not to schedule too many activities or participants might lose interest.

Of course, team building does not always occur in a classroom setting style. Some groups, depending upon available resources, utilize ropes courses or wilderness activities. The key to successfully incorporating these kinds of activities is to have an alternate plan in case weather or complications prevent you from pursuing them. Also, knowing your group’s personal limits is very important when it comes to taking advantage of outdoor activities. For example, a wall-scaling or other type of climbing activity may be too much for students who fear heights.

An interesting aspect of team building to keep in mind is that you never know what might be successful with your group. You might plan a number of activities in the retreat “classroom” and have minimal success with them all. Then, the
same group might go out to the store and get lost on the way back, which can turn into a very successful team building activity. During the process of trying to get back to the retreat site, everyone in the vehicle plays a role, whether it's map-reader or backseat driver. This not only helps build the team, it also gives retreat leaders and advisors an idea of how students might react in a crisis situation throughout the year.

Here are some tried-and-true team building exercises that have been used at many institutions:

- **Photo Scavenger Hunt**— Give small groups of students an instant or digital camera and a wacky list of things to capture on film.
- **Whitewater Rafting, Canoeing**—This will require professional guides, equipment and safety precautions, but is nevertheless an effective team building activity.
- **Building a Habitat for Humanity House**—This will also allow your organization members to work with larger teams in the community.
- **How to Make a Peanut Butter Sandwich**—This activity is exactly what it appears to be, but in execution may help participants learn more than they thought possible. It teaches the art of communication and the importance of describing and following steps precisely when completing a project.
- **Jeopardy and Taboo** are game formats that can be borrowed for team building activities. Simply utilize information from questionnaires or campus trivia that are pertinent to your leadership. For example, in a **jeopardy** style exercise, the answer given might be: The person I call when making check requests. The question would then be: Who is Jack Robertson? Also, the name of a category could be: "I Know What You Did Last Summer." This category would contain information about summer jobs held by members of your leadership. Just be creative—the possibilities are endless.

### Diversity Programs/Training

During an organizational retreat, diversity training activities are essential. Institutions of higher learning are so culturally diverse that programming boards, Greeks and resident assistants are all in need of training that helps students recognize and appreciate differences. This is a great opportunity to bring in a staff or faculty member who has expertise in multicultural programming and/or diversity training. Once they have interacted with the group, this "campus connection" can now serve as a resource for recruitment and retention of multicultural students, programs on cultural norms (which can be great residence hall programs) or culturally acceptable advertisement practices.

### Publicity and Promotion

With the advent of affordable digital photography and color printers, it is now more important than ever to come up with creative ways to publicize and promote programs, no matter how large or small your budget. Leadership, diversity and other such subjects are covered in depth at most retreats; however, substantial time is rarely spent on publicity and promotion. Consider utilizing part of your retreat schedule to brainstorm ideas for creative publicity and promotion. An example of an activity that is often used for training in publicity and promotion is the "Yellow Pages Activity." It is conducted by first taking a random page from the phone book. Next, split the leadership into small groups. Ask the students to choose three to five businesses from the page to promote on campus. The only stipulation is that they must advertise the businesses without the use of flyers, e-mail or posters. This will create a competition to see which group can produce the most creative publicity. Encourage students to think outside the box. Finally, use this exercise as a way to begin brainstorming about high-quality promotional plans for the organization's programs by applying the same rules as used in the exercise—the main idea being that flyers and e-mail should be used only to complement primary publicity efforts.

### Specific Institutional Subjects or Programs

Remember to consider specific institutional issues when planning a retreat. Diversity initiatives, new rules about where students can advertise on campus, retention of volunteers, or recycling are all issues that are specific to an institution that could have a dramatic effect on pro-
grams and services offered by your organization.

Retreat Materials

You might want to develop a set of materials to be distributed to retreat participants. This information can serve to reinforce the learning that takes place during the retreat and it most often is assembled in packet, folder or notebook form. There is a substantial amount of information that can be distributed to retreat participants, including:

- Contact information for the organization's leadership;
- Quick reference phone list (i.e. whom to call for tables, chairs, checks, etc.);
- A campus master calendar;
- An organizational calendar;
- A campus phone book;
- Leadership contract and/or employee contract (if positions are paid rather than voluntary);
- Mock copies of contracts and/or forms;
- Retreat agenda;
- Tips for success in board positions and/or campus/organization rules and regulations;
- Scrap paper;
- Pen/pencils;
- Organizational constitution and/or by-laws;
- Campus rules and policies (highlight those that are specific to the organization, i.e. where advertising can be displayed, campus noise restrictions, alcohol in public facilities, etc.);
- Dividends;
- Other miscellaneous retreat materials as needed;
- Evaluations of previous events; and
- Evaluations for the retreat and for upcoming campus events.

The Schedule

Depending on your retreat location, the amount of time allotted and the number of topic areas to be addressed, your final schedule will vary. However, here are a few rules of thumb when making a retreat schedule.

- At the beginning of the retreat, set expectations and rules.
- Set organizational goals for the year.
- Set individual goals for the year.
- Use icebreakers and team building exercises to help accomplish goals and to set the tone for the retreat.
- Be sure to add plenty of time for breaks and refreshments (a general rule that some planners use is one 15-minute break per 90 minutes.)
- Vary presentation methods to maximize participant attention.
- Allow plenty of time for meals and sleep.
- If you are unable to cover a subject area appropriately, don't be afraid to use it as an "in-service" or meeting topic at one of the general meetings rather than as a component of the retreat.
- Include physical activity and relaxation.
- At the end of the retreat, debrief participants on the time spent together, and evaluate the retreat, as well as organizational and individual goals. Ensure that these goals are met or that participants now have the knowledge and tools to meet them.
- Have Fun!

Assessment

Assessment is another essential facet of any retreat. It's important for a number of reasons and should be performed at various times throughout the year. Many times, assessment is the only way to calculate the retreat's effectiveness.

At the beginning of the retreat, ask students to write down what they expect to learn from it. Although you have executed advance planning for the retreat, this information gives you an idea of what you should spend more time explaining or presenting while it is in progress. For more experienced groups, send out an instrument prior to the retreat planning process that inquires about the areas they wish to cover. This will help give the retreat direction and ensure that you will not waste time covering issues that do not require additional emphasis.

An important component of retreat-related assessment should be conducted on an individual level later after the retreat itself is over. Such evaluations should be performed at least once a semester to provide a general overview of the organization and to allow time for personal and professional growth. Members of the executive council can be provided with a form where they are asked to assess each other on an anonymous basis and then their evaluations should be further evaluated and interpreted by an advisor. The advisor should not share each comment or the exact documents from each board member. They should instead look for a fair share of both positive and constructive negative feedback for each member and communicate that information in a "closed door" interview. This process is delicate and requires a mature, objective perspective.

Organizational assessment is equally important. The evaluators, however, can include individuals outside of the leader-
ship. Students, faculty and staff can be polled in a survey that is included in your assessment materials. Another idea is to create a steering group for your organization that helps leadership grade their effectiveness on campus. This group should include persons who have a vested interest in the organization, as well as an interest in providing leadership that will further the mission of the group.

Finally, assessment is important for next year’s planning. When the planners for next year’s group reviews your assessment of this year’s retreat, they can see what successes have been achieved and look to build on them. The new planners will also know what has been ineffective and why. They can make decisions to remove these items or tackle the reasons they were ineffective and improve on them.

Conclusion

Planning a retreat for your student leader group takes a great deal of thought and preparation. In this article, we have outlined many of the basic steps we hope will help make your retreat an effective and successful one—an instructive and fun event that participants will be talking about long after they return to their regular schedules.

About the Authors

Roland N. Bullard Jr. is director of Student Activities and Springs Campus Center at Presbyterian College (SC). He previously served as resident director and advisor to the Multicultural Student Union and Volunteer Services at the school. In 2001, he was named Presbyterian College Advisor of the Year. He holds a bachelor's degree in communication from Florida Atlantic University and a master's degree in higher education administration from the University of South Carolina. In NACA, he serves as the 2003 Orientation Coordinator for NACA South. In 1996, he served on the former Southeast Region’s showcase selection committee.

Clara Jackson is assistant director of Student Affairs at The Juilliard School (NY), where she previously served as coordinator for Student Activities and Development. She holds a bachelor's degree in sociology from Florida Atlantic University and a master's degree in higher education administration from New York University.