

# Conducting Successful Retreats

by Peter Malvicini and Olivier Serrat

A retreat is a meeting designed and organized to facilitate the ability of a group to step back from day-to-day activities for a period of concentrated discussion, dialogue, and strategic thinking about their organization's future or specific issues. Organizations will reap full benefits if they follow basic rules.

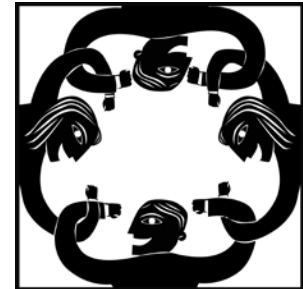
## Rationale

People look forward to retreats (or workshops) with excitement or dread. At best, it is a time for renewal, team building, and focusing work. At worst, it is a dull two days of lectures or extended meetings. A good retreat works in three dimensions—the practical, the ideal, and the political—ignore any one and you are headed for trouble.

## Applications

There are as many reasons for conducting a retreat as there are issues and challenges facing an organization. Among the most common uses of retreats are

- Helping set or change strategic direction.
- Fostering a collective vision.
- Creating a common framework and point of reference.
- Developing annual goals, objectives, and budgets.
- Discussing specific issues or challenges facing the organization.
- Dealing with sources of conflict and confusion.
- Generating creative solutions for entrenched problems.
- Improving working relationships and increasing trust.
- Encouraging honest and enlightened conversations.
- Letting people be heard on issues that are important to them.
- Orienting new staff.



## Tips for Effective Retreats

Here are a dozen tips to make retreats more effective

- **Start at the End.** Know what you want from your retreat, “your intended outcomes,” and how you will follow up the event. Work with a planning group in your unit and be clear about these outcomes from the beginning. Be careful not to define predetermined results: instead choose a focus to guide your work: “a plan to implement x,” “a new strategy for y,” “actions to strengthen workflows and business processes,” etc.
- **Get Away.** Allow some physical or psychological distance from the office and see what happens. If you are on-site, distractions can undermine work and preserve the formality one is trying to break down.<sup>11</sup> Crossing the street is better than going no-

<sup>11</sup> The reasons for this are straightforward: retreats require long periods of intense, uninterrupted discussion; participants are less likely to be interrupted by phone calls and other staff if they are away from the office; participants can better focus on the topics under discussion; participants are more likely to stay for the entire time; and being “away on retreat” creates an atmosphere that is more conducive to teamwork, creative thinking, and consensus building.

where. If working for a couple of days, try something further afield—the cost is small compared with the gain from the energy and continuity you create. The intensive effort and concentrated time staff can give to an effort normally pays off. The work and fun had in two 10-hour days off-site gains more than two six hour days on-site and much more than weekly committee meetings for a year.

- **Suspend the Rules.** The workplace carries sets of unspoken rules and implied norms of behavior, especially when dealing with people of different position and status within the hierarchy. At least during your retreat, remove these boundaries and create broad ownership of the task as a team. During introductions make this clear. Rein in any dominant senior personnel and let participants see how important it is that all have a voice. And please leave formal business dress behind.
- **Work as a Team.** Retreats are special. So do not organize them like a two-day staff meeting or a symposium. If participants are passive, they will lose interest even in the most captivating speakers. Information sharing is more effective by print through a briefing pack for the event. Short briefings are useful as background for an activity, but spend most of your time in deliberation, preferably in smaller groups, and large group discussion of those ideas.
- **Discuss the “Undiscussable.”** All units have concerns not normally put on the table (but everyone is aware of them)—typically these issues are a barrier to productive work. A retreat can be a time to work on these areas positively and productively. Discussions in smaller groups can help staff vent any frustrations and then return to the larger group with practical solutions. Do not miss a chance to do important work and break through a serious bottleneck to effectiveness.
- **Keep it Real.** Do real work. As much as possible, avoid simulations, abstract discussions, and lectures from experts. Real tasks energize participants, combined with challenging matters that concern them most, and a process that lets them question, deliberate, and refine their ideas and actions. “Experts” can be useful as resource persons to serve the task, but many find the combined expertise of their staff to be more than adequate for the job.
- **Do Not Play Games (Just Have Fun).** By design, a retreat is less formal than the workplace. That informality is one way of engaging people and creating a safe environment. Game-playing may send mixed signals, especially when the organization’s culture views them as silly. Creative ways of working with small groups or teams and creative ways of presenting ongoing work will allow the humor of participants to break through spontaneously—this can be useful especially when dealing with difficult topics and concerns. This is also an effective way of indirect teambuilding.
- **Mix it Up.** Variety will hold the interest of participants. Try different size discussion groups, different small group processes, and different ways of sharing group outputs. Avoid organizing things the same way you would back at the workplace. People learn and plan differently—create opportunities for all participants.
- **Think Big.** By stepping away from work routine, participants have a chance to rediscover the meaning and motivation for their daily work. Whenever possible, allow all staff to envision the future of the organization—they can build a shared understanding, and this is powerful. Staff then move swiftly from a “bird’s eye view” of desired outcomes and goals, translating them into concrete results.
- **Think Small.** Staff and management want concrete results. Discussing the “nuts and bolts” of implementation means the difference between real follow-up and good intentions. There will not be time to consider all details. But, draft basic timetables and share responsibility for follow-up tasks before you leave the retreat.
- **Just Do It.** Deliberation is great. Deliberative action is better. The climax of a good retreat should be decisions for new action. A poorly planned retreat will not leave enough time for this and the lack of follow-up will be obvious.
- **Get Professional Help.** Planning your retreat need not drive you insane. Most organizations can benefit from using a facilitator with expertise in group dynamics, group processes, team building, decision making, and consensus building. He or she will help plan the retreat, develop the agenda, and set realistic goals and expectations. During the retreat the facilitator will manage or facilitate group discussions.<sup>2</sup> The facilitator should have no particular stake or interest in the issues being discussed. His or her sole interest should be in

<sup>2</sup> This will involve tracking three levels of activity—the substance of the work, the process, and the relationships (psychosocial environment)

helping the group have a successful retreat. During the retreat, the facilitator will also function as a recorder for the group by capturing the key points on a flip chart or on computer. After the retreat, the facilitator will generally provide the group with a written report summarizing the discussions, any decisions that were made, and action steps to be taken. If no professional facilitators is available, consider training members of your unit or borrow (or swap) experienced facilitators from other units.

**Table: Retreat Planning Checklist**

Purpose	Location
<ul style="list-style-type: none"> <li>• What is the purpose of the retreat?</li> <li>• What criteria will we use to determine that the retreat was successful?</li> <li>• Who supports the idea of holding a retreat?</li> <li>• Who is opposed to the idea?</li> <li>• Who needs to attend the retreat?</li> <li>• Who will participate?</li> <li>• Will all the key participants be able to attend?</li> <li>• How much time will they be willing to spend at the retreat?</li> </ul>	<ul style="list-style-type: none"> <li>• Where will the retreat be held?</li> <li>• Are the rules governing the use of the space acceptable?</li> <li>• Can the room be arranged as we want it?</li> <li>• Are the chairs comfortable?</li> <li>• Is there good control over lighting and air conditioning?</li> <li>• Can we have food, snacks, and refreshments in the room?</li> <li>• Who will provide food, snacks, and refreshments?</li> <li>• Can we hang flip chart paper on the walls?</li> <li>• How will breaks and meals be handled?</li> <li>• Will overnight accommodation be needed?</li> </ul>
Equipment	Facilitator
<ul style="list-style-type: none"> <li>• What equipment will be needed?</li> <li>• Who will provide it?</li> <li>• Who will operate it?</li> </ul>	<ul style="list-style-type: none"> <li>• Do we need an outside facilitator?</li> <li>• Who will facilitate?</li> <li>• How much experience does the facilitator have with groups like ours?</li> </ul>
Recording and Reporting	
<ul style="list-style-type: none"> <li>• Do we want to record the meeting?</li> <li>• What kind of a retreat report do we need?</li> </ul>	

Source: Authors.

## Reasons Not to Hold a Retreat

Retreats will not help if the organizer has no intention (or ability) to follow through or act on the suggestions of participants or if the intention is to

- Fulfill a covert agenda.
- Make an individual's problem the group's problem.
- Talk at participants instead of with them.
- Improve morale.
- Treat the retreat as a reward.

## For further information

Contact Peter Malvicini, Strategic Consultant (pgm1@cornell.edu) or Olivier Serrat, Head of the Knowledge Management Center, Regional and Sustainable Development Department, Asian Development Bank (oserrat@adb.org).

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Asian Development Bank  
6 ADB Avenue, Mandaluyong City  
1550 Metro Manila, Philippines  
Tel +63 2 632 4444  
Fax +63 2 636 2444  
knowledge@adb.org  
www.adb.org/knowledgesolutions