Retreat Planning Tool

A simple tool for planning a board or staff retreat that actually moves your organization forward.

Three Questions

Before you even pick a date or venue...

- What decision or shift do we need to make that we can't make in a regular meeting?
- Who actually needs to be in the room for that to happen?
- What does a good outcome look like by the end of the day?

Building Blocks

Skipping even one is usually where retreats lose value...

- **Clear purpose:** In a sentence or two, explain why this retreat exists.
- **Right people:** Make sure everyone needed for the decision (or intended outcome) is there.
- **Protected time:** Ensure a space away from email, phones, and the daily work, even if it's just for a few hours.
- **Outside facilitation:** Have someone facilitate who isn't also responsible for running the meeting and the organization.
- **A way to capture decisions:** Ensure commitments made are in writing. Use notes, a whiteboard (whatever works!), as long as it's someone's job.
- **A follow-up plan:** Determine who owns each decision after the retreat and by when. Without this, all the good energy and momentum are lost.
- **Budget confirmed:** Get space, food, and facilitation costs approved before you send the calendar invite.

SAMPLE AGENDA

Adjust the timing to fit the time you have.

Morning: ***Reflect:*** Where are we now, and how did we get here? Ground the group in shared facts before moving to opinions.

Midday: ***Decide:*** Work through the real questions you came to answer. This is where most of the time should go.

Afternoon: ***Commit:*** Turn decisions into owners and next steps. Nothing leaves the room without a name attached.

A retreat can take many forms: future planning, leadership development, or team building to name a few. Stepping away from the day-to-day grind can lead to renewal, clarity, new ideas, and stronger relationships.

Need help facilitating your retreat? Connect with us!

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