

Bibliography for Meetings and Staff Retreats

Retreats That Work: Everything You Need to Know About Planning and Leading Great Offsites (Pfeiffer Essential Resources for Training and HR Professionals) by Merianne Liteman, Sheila Campbell, and Jeffrey Liteman

The Secrets of Facilitation: The S.M.A.R.T. Guide to getting Results with Groups by Michael Wilkinson

Facilitating with Ease!, with CD: Core Skills for Facilitators, Team Leaders and Members, Managers, Consultants, and Trainers by Ingrid Bens

Facilitation at a Glance!: A Pocket Guide of To... by Ingrid M. Bens

The Skilled Facilitator: A Comprehensive Resource... by Roger Schwarz

Try these action items to increase staff participation
www.susanbaker.com/page.asp?PageID=8478

How to plan a successful retreat
www.leadershipretreat.net/planretreat.html

The Boss's Survival Guide by Bob Rosner, Allan Halcrow and Alan Levins

Successful Manager's Handbook by Susan H Gebelein, Lisa A. Stevens, Carol J. Skube, David G. Lee, Brian L. Davis and Lowell W. Hellervik

www.leadershipretreat.net/planretreat.html

Retreats That Work: Designing and Conducting Effective Offsites for Groups and Organizations by Sheila Campbell and Merianne Liteman

businessmanagement.lifetips.com/cat/59513/staff-meeting

Quality Customer Service, William Martin, B., PhD, Third Edition, Crisp Publications, Inc., Menlo Park, CA, 1993.

101 Games for Trainers, Bob Pike, with Christopher Busse, HRD Press, Inc., Amherst, MA, 2004.

The Big Book of Humorous Training Games, Doni Tamblyn, & Sharyn Weiss McGraw-Hill, San Francisco, CA, 2000.

Planning for Your Staff Retreat Outline
Staff Retreat Presentation for NASFAA
Kay Soltis and Wendy Olson
July 12-15, 2009, San Antonio, TX

Allow plenty of time for the planning process – Careful plans will create success

- a. Determine the desired outcome
- b. Determine the amount of time and money available for the retreat
- c. Determine who should be involved
 - i. Senior management
 - ii. Counselors
 - iii. Support staff
 - iv. Vice president
 - v. Other offices that you may work very closely with (they can participate for part of the time or all)
 - 1) Admissions
 - 2) Student Accounts
 - 3) Registrar
 - 4) Student Services
 - 5) ROTC
 - 6) Student Employment
 - 7) Veterans Affairs
 - 8) Athletics
 - 9) Institutional Technology
 - vi. Outside visitors
 - 1) Guarantor
 - 2) Expert
- d. Determine whether you will have an internal facilitator or external facilitator
- e. Determine when to have the retreat and how much time to allow
- f. Determine where to have the retreat
- g. Seek input into the planning process from those who will be involved
 - i. Suggestion box
 - ii. Survey of staff's needs/concerns – anonymous?
 - iii. Informal discussion at a staff meeting
- h. Set objectives and goals for the retreat
- i. Establish agenda
 - i. Keep the agenda interesting, with changes of pace throughout the day
 - ii. Be realistic in what can be accomplished for the retreat – too much on the agenda can be overwhelming
 - iii. Be sure to include adequate breaks – they can be productive too
 - iv. Schedule in some fun and/or small group activities
 - v. Begin with what you wish to accomplish and the ground rules for the retreat (e.g., safe environment/respectful of others)

- vi. End with what you have accomplished and what steps you will take to carry out the tasks that were established during the retreat
- j. Assign staff to assist with certain parts of the agenda, which should include persons that will take the minutes for the meeting
- k. Create schedule for the day
 - i. Keep in mind when meeting space is available
 - ii. Keep in mind the needs of staff – small children at home may make it difficult for retreat to go late into the evening
 - iii. Recognize the affect food/time of day has on energy levels – have more active participation in the afternoon to keep people awake
 - iv. Build in some flexibility into the schedule knowing that some things may take longer than planned
- l. Take care of the logistics for the day or have a volunteer assist and review expectations
 - i. Transportation
 - ii. Access
 - iii. Food
 - iv. Required payments
- m. Share the agenda, schedule, logistics before hand with the participants so that they come prepared

Conducting the retreat

1. Facilitator is responsible for keeping the retreat on schedule and focused on goals
2. Logistics person is responsible for making sure that the food is out when needed, clean up, items needed are at hand
3. Note takers will take notes throughout the retreat. Good idea to have more than one and a laptop available for taking the notes.
4. Keep in mind people's different learning styles – have visual aids and some kinesthetic activities
5. Consider having some of the staff present a skit

After the Retreat

1. Send out the minutes of the retreat to all participants
2. Generate a "To Do List," Include a timeline and the person responsible for the task to ensure follow through and productive outcomes of the retreat.
3. Create a short survey to assess effectiveness of retreat (should include logistical questions to assist in future retreat planning)