

# Planning and Conducting Retreats

## **Objectives:**

- To provide lion leaders with information about retreats
- To provide lion leaders with a sample agenda, and suggestions for the retreats

## **Organization:**

This document is organized into several sub-topics. For each sub-topic there is an overview explaining the sub-topic in some detail.

## **Overview:**

The purpose of a retreat is to address concerns and overcome obstacles that cannot be successfully discussed or solved at regular meetings. Overall a retreat should become a positive experience for all participants. All identified problem areas and the overall health of a district, zone, or club can be deliberated in a neutral setting without interference of regular business matters. Regardless of all specified items on the agenda, several objectives are always present and should be addressed. The following section highlights general goals of a retreat.

### 1. Goals of a Retreat:

- To improve the group's atmosphere, operation, projects, membership, leadership growth, attendance, self image, pride and increase involvement of members
- To allow all members who attend the retreat to make input
- To improve and establish open and honest communication between Lions
- To develop better personal relationships with all participants
- To build unity and improve ethics and principals of Lionism
- To reach agreement on district, zone, or club matters
- To identify goals and develop plans for timely accomplishment
- To consider approaches to increase membership

## **Sub-topics:**

1. Retreat Logistics
2. Retreat Coordinator
3. Retreat Facilitator
4. Session Agenda
5. Sample Registration Flyer

## **Common Questions Related to the Topic:**

- How long should a retreat be?
- How many participants should a retreat have?
- What activities should be done at the retreat?
- Who should be invited?

## Retreat Logistics

To have a successful retreat there must be proper organization and planning. This sub-topic lists the key areas that need to be addressed when planning a retreat.

- **Participants**
  - The number of participants should range between 20- 40 lions
  - Only members should be in attendance
- **Registration**
  - To ensure accurate planning participants should be required to register for the retreat a few days prior to the retreat
  - The participants should provide one positive and one negative aspect of the district, zone, or club, when they turn in their registration form for the retreat
- **Action Plans**
  - Participants will be asked to form an action plan during the retreat
  - After the retreat these actions plans will need to be approved and have periodic progress checks
  - Prior to the retreat, there should be a plan for where and when these action plans will be reviewed
  - This follow-up plan should be shared with the participants at the retreat
- **Location and Materials**
  - Ideally retreats should be conducted in a location that groups do not usually meet. (Hotels, resorts, and conference centers located in a quiet setting are often good places to use)
  - Ensure that the meeting room has the following materials:
    - Flip charts, with lots of markers
    - Colored markers
    - Easel
    - Masking tape
    - Chairs and tables arranged so that everyone can see
    - The ability to bring food/beverages into the room
  - Casual dress is recommended
- **Plan for a catered lunch**
  - Ensure that food and beverages are allowed in the meeting room
  - Plan for something easy to eat as it is a working lunch

## Retreat Coordinator

The coordinator is the key to a smooth retreat

- Primary responsibilities include:
  - Arranging the meeting site rental
  - Arranging transportation for the group (if necessary)

- Arranging meals and snacks to be provided
- Preparing all the materials needed (paper, pens, etc.)
- Communicating locations, time, and directions to all participants
- Collect and organize the “Pros and Cons” on the registration form
- Pay bills and organize the retreat budget

## Retreat Facilitator

- A facilitator should be selected several weeks prior to the retreat
- A facilitator should possess the following characteristics:
  - Be unrelated and unbiased to the group at the retreat
  - Be respected by the participants
  - Be a good communicator
  - Be diplomatic
- A facilitator does the following:
  - Sets a positive tone for sessions
  - Starts and ends the retreat on time
  - Encourages participation from everyone in the groups
  - Ensures that everyone is actively participating – not dominating

## Session Agenda (for 1 day retreat)

A retreat should be held on a non-working day and be 6 or 7 working hours in length. Listed below is a sample itinerary with the estimated amount of time that should be spent on each activity:

### Morning

**Opening remarks .....5-10 minutes**

- Thank the participants for their attendance
- Explain why the retreat has been called
- Discuss the schedule for the retreat
- Explain the rules:  
When addressing the group, all participants “must” stand to state their case  
Everyone who comes to the retreat must participate, or they can not be involved in the retreat

**Icebreaker .....15-20 minutes**

- Relax the participants with a fun activity which requires everyone to participate

**Prioritize and Clarify Negative Points .....30-60 minutes**

- **Option 1:** If negative aspects are submitted on the registration form (recommended)
  - List the negative aspects provided by the participants on the registrations forms and compiled by the coordinator
  - Ask the participants which points need to be clarified

- Ask for a volunteer to explain one of the points
- When everyone understands all of the points, begin to prioritize them
- Ask the participants which points are the most important
- Determine the top five problems with the participants
  
- **Option 2:** If negative aspects were not submitted with the registration form
  - Call on each participant to “stand” and use **one** word to describe a negative aspect of the group
  - After everyone has stated their word, have each person explain why they stated that negative word
  - When everyone understands all of the points, begin to prioritize them
  - Ask the participants which points are the most important
  - Determine the top five problems with the participants

**Divide into 5 Small Groups ..... 5 minutes**

- Have the participants number off by five
- Tell the participants who called “one” to go to a certain table
- Do the same with the other numbers
- Give each group one of the five negative aspects

**Discuss the Problem/Solution in Small Groups.....45-50 minutes**

- Have each small group discuss and define the problem in detail
- Have each group develop an Action Plan on how to eliminate the negative problem

**Prepare Presentation ..... 15 minutes**

- Have each group prepare a flip chart explaining their Action Plan
- Tell the groups that they will have three to four minutes to present the solution

**Presentation of Solutions for the Negative Problem.....30 minutes**

- Have each small group present their action plan to the other groups
- Encourage applause and praise for each group

**Lunch Break**

- Divide the Group into different groups of four to six people
- Allow time for informal conversations within the groups

**Afternoon**

**Prioritize and Clarify the Positive Points .....30-60 minutes**

- **Option 1:** If positive aspects are submitted on the registration form (recommended)
  - List the positive aspects provided by the participants on the registrations forms and compiled by the coordinator
  - Ask the participants which points need to be clarified
  - Ask for a volunteer to explain one of the points
  - When everyone understands all of the points, begin to prioritize them
  - Ask the participants which points are the most important
  - Determine the top five attributes with the participants

- **Option 2:** If positive aspects were not submitted with the registration form
  - ❑ Call on each participant to “stand” and use **one** word to describe a positive aspect of the group
  - ❑ After everyone has stated their word, have each person explain why they stated that positive word
  - ❑ When everyone understands all of the points, begin to prioritize them
  - ❑ Ask the participants which points are the most important
  - ❑ Determine the top five attributes with the participants

**Divide into 5 Different Small Groups.....5 minutes**

- Have the participants number off by five
- Tell the participants who called “one” to go to a certain table
- Do the same with the other numbers
- Give each group a one of the five positive aspects

**Discuss Positive Aspect/Develop an Action Plan/Prepare Presentation.....45 minutes**

- Have each small group discuss and define the attribute in detail
- Have each group develop an Action Plan on how to promote the attribute

**Presentation of the Positive Points .....30 minutes**

- Have each small group present their action plan to the other groups
- Encourage applause and praise for each group

**Closing.....25 minutes**

- Thank everyone for participating in the retreat
- Explain how the ideas in the action plan will be used
- Lead a cheer or activity to make sure everyone is excited about the results of the retreat and ready to make a difference

# Registration Flyer

In order to encourage participation in the retreat, the retreat must be advertised. Naturally you will discuss the retreat at a group gathering, and we suggest following the discussion with a registration flyer mailed to all of the eligible participants.

The following two pages are a sample registration flyer for the retreat. They are meant to be printed on the front and back of one page and then fold the page in half.

Before you can use the flyer for your own retreat, it needs to be changed to incorporate your specific retreat information. Here are several steps that you need to do to use the registration flyers:

- Look at the flyer and decide how you will modify it
- Download the flyer from [www.lionsclubs.org](http://www.lionsclubs.org) or re-create a similar document on your own computer
- Edit the flyer and fill in all of your retreat information
- Print, fold, and staple the flyers
- Mail the flyers to all of the eligible participants

# Retreat Information

## Benefits:

- To improve the group's atmosphere, operation, projects, membership, leadership growth, attendance, self image, pride and increase involvement of members
- To allow all members who attend the retreat to make input
- To improve and establish open and honest communication between Lions
- To develop better personal relationships with all participants
- To build unity and improve ethics and principals of Lionism
- To reach agreement on district, zone, or club matters
- To identify goals and develop plans for timely accomplishment
- To consider approaches to increase membership

Date:

Start/End Times:

Cost:

Lunch provided

Coordinator: Name \_\_\_\_\_

Phone No \_\_\_\_\_

Dress: Casual

Location:

Directions:

# Registration Form:

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Deadline:

Coordinator name:

Address:

List a positive aspect of the district/zone/club:

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List a negative aspect of the district/zone/club:

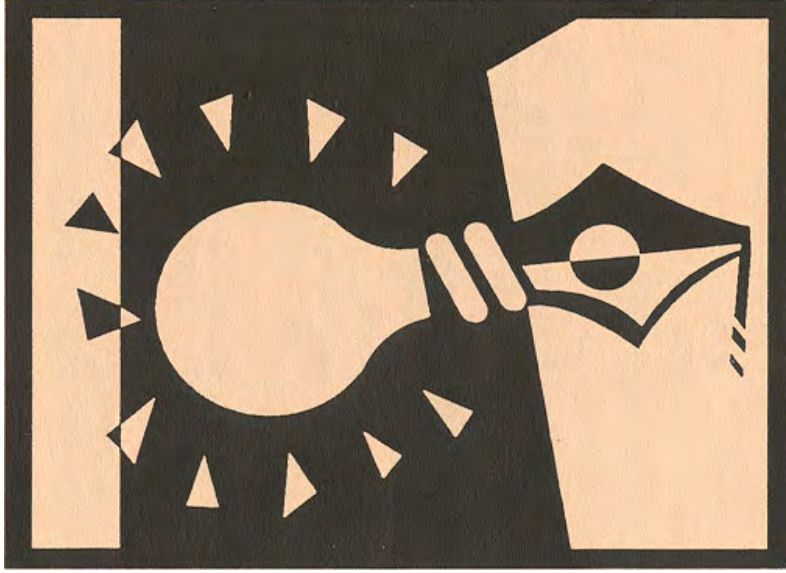
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Fax to: xxx-xxx-xxxx



# Retreat

From: \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_

Place  
Postage  
Here

TO: \_\_\_\_\_  
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