

## **Retreats – Creating An Environment For Success**

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Meetings and retreats are used for many different purposes. Sometimes they are to inform a group about decisions that have been made. Other times they are used to develop the strategic or tactical questions that must be answered prior to announcing results internally or to the public.

Environment is often ignored for regular Board meeting, but without great harm. Just about any reasonable meeting space can be made to work. A RETREAT, where the discussion will be longer, more spirited (a nice way to say argumentative) and have serious long-term consequences for the organization is where control of the environment is important.

The environment includes all of the factors around the physical setting of the meeting. It can also include general rules of the meeting. These help set the tone and can greatly influence the results.

We are social animals. Getting together is important any time we have to work out differences, resolve issues or attempt to look into the future. Our meetings can succeed or fail for a large number of reasons. The objective here is to eliminate the environment as a cause of failure.

As with any prescriptive advice, there is always a caveat. When dealing with human beings, there are few absolute answers. If you are uncomfortable with any aspect of the following recommendation, change it. This is not an all or nothing set of suggestions. Use what makes sense to you, the group, the situation and your budget.

Setting up an environment for success may not be difficult, but it is vitally important. While none of the following suggestions are very involved, it takes time and money to do them all. Some meetings are held at the last minute and some groups will have little or no leeway on where to meet or how much money can be spent. Not every aspect of the perfect meeting can be done every time. Do what you can. These ideas work.

Circumstances and budgets have forced all of us to hold meetings in less than ideal circumstances. A poor environment may add a level of complexity and make the facilitator's job more difficult. It does not make it impossible. Just remember, small changes to the environment can have a big impact on the retreat. Do what you can and take advantage of the easy ideas.

### **Location**

The meeting location sets the stage for everything that will come after. Therefore, the first order of business is to determine where to hold the meeting. The choices are really very few. There is a meeting room at someone's office, a restaurant, a hotel, a volunteer's house or a donated space in the basement of some building. It can be at a church or temple, a school or the local community center. It can be in town, in another city or out in the country. Each type of location offers advantages, disadvantages and various levels of cost. If your agency/organization is lucky enough to have sufficient space, that may be your best and least expensive option.

Location also brings up the issue of "come alone" or with a partner or even the whole family. Inviting guests adds an additional level of complexity. Are guests invited to meals or other functions (which will change the dynamics)? How to handle an irate "Other" who is unhappy at being ignored and causes the attendee to lose focus? What if the discussion is going especially well, does it have to be stopped due to scheduling of the guests?

If this is a business meeting for a critical purpose (not all meetings demand full attention), do it without extra attendees. Do not invite guests if there are contentious issues to be resolved. Meetings of general announcements, presentations of project results and where there is little or no dissent are often treated as board member perks. Others should be

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encouraged to attend. It is a chance to get away and can be a major benefit to the attendee and their guest or family.

An office, for all of its positives, may not be the best choice. It is frequently the least expensive, but is prone to interruptions by phone calls, people who just happen to drop by and that sudden emergency, "...as long as you are here, can you take just a second to..."

If a member of the Board or committee donates the office space, be careful of "taking advantage" of your special friends. Where possible, at least offer to pay for the cost of food and beverages, provide clean up assistance and thank any support staff at the office who help the meeting run smoothly.

The seating and setting of the work area is the next consideration. Again, for a regular board meeting that is to approve previous action, where there is little contention and there is general agreement on the actions to take, any table in any location can work.

Restaurants are OK for shorter meetings and working meals. Their "party" rooms are not always conducive to contentious retreats. The chairs tend to be harder, the spaces less sound proof (i.e. you can be disturbed by groups next door) and the lighting is dimmer.

Meetings in restaurants are not known for having lots of workspace. If you expect people to be taking notes, shuffling stacks of paper or needing to spread out, there are better environments. This does not mean that a meal in a restaurant at a hotel setting will not work, just plan to use it for a discussion topic where one person per group or table can be appointed to take notes. Then review what was discovered when you reconvene.

Check the space out for "quietness." Wherever possible, insist on an empty room between you and the nearest activity or other meeting. Do not accept rooms near a live band or D.J. Be especially careful of large group meetings near by. They often tend to be loud and will interfere with what you are doing.

Hotels and resorts normally provide the best meeting options, but are usually the most expensive. They are flexible in terms of furniture, room arrangement and special setups. One organization can arrange for your meals, beverages and overnight services for multi-day retreats. Do not reject this option out of hand. You may be surprised at the special deals you can get, especially at a city / business location over a weekend.

Be careful of fancy resorts, these can sometimes confuse the focus of the meeting. If everyone is chomping at the bit to get out to a famous golf course, they will not be concentrating on the business of the organization. Once again, know your group and their desires. Some high power boards are willing to pay extra to attend a meeting where they can get some much deserved "R&R" and even bring their family.

There are exceptions to every rule, but for most non-profit meetings, the location needs to be easy and convenient to get to. If your attendees are flying in, facilities near airports with free transportation are always winners. Pick airports that most of the participants can get to non-stop.

If you use a city location, pick it for convenience as well. Make sure to arrange for parking in advance. Most board members do not like surprises. An unexpected \$15 parking tab may not be a financial burden for the big donors, but it could become an irritant and a reason that leads to an important volunteer dropping off the board. For an underpaid (or unpaid) volunteer, it may create an embarrassment if they do not have the cash to get out of the parking garage.

Always make an in person visit to any site. Pictures and brochures do not tell the real story. See the room you will meet in, see where you will eat and, if overnight accommodations are to be used, see the rooms. Check for ADA compliance especially if you know attendees will be using wheelchairs or need other assistance. It is your responsibility to make sure everything is top notch and works for your group.

### The Room

The room itself needs to be large enough for comfort and have room to “move.” Oddly shaped rooms may look good in the pictures, but seldom work as well as a traditional square or rectangle. When there are less than eight people, almost any board type room with an oval or rectangular table will work. Groups of over twenty require many special arrangements (and are beyond the scope of this chapter). The following guidelines will work best for groups between eight and twenty.

Our experience suggests that thirty linear inches is a reasonable amount of space per person at a table. Therefore, eight people (four on a side) need a table at least ten feet long. This may seem large, but if you are going to be sitting there for eight to ten hours, the space is necessary. Twenty-four inches is the minimum to be able to do anything. It is not as comfortable, provides little “personal space” and certainly will not be conducive to a tough meeting agenda.

Space is necessary between the sides of the table and the walls so people can move around. A good minimum is three feet from the table to the nearest wall. That way, someone can squeeze behind a participant sitting at the table.

If there is space, a coffee break service in the room is a wonderful perk. The longer the meeting, the more necessary it is. There should be space to stand at the coffee service without interfering with any participant. Some meeting rooms have a service bar built in. These take up less meeting space and are very effective.

At the front of the room, space for a facilitator to work and write on easels requires five to six feet in front of the table. The facilitator will often have a chair for meals, but it is usually pushed under the table or kept out of the way during most of the meeting.

When setting the room, windows and doors can be a problem. The best setup is for the door to be at the back of the room. That way, attendees can enter and leave without interfering with the facilitator or disturbing the meeting (or at least minimizing the disturbance that will be caused).

Windows should also be at the back of the room or have drapes / shades that can be pulled. There is nothing worse than a meeting where the participants are looking out on a sunny day with a beach or mountains in the view. Their attention will constantly be a million miles away. Uncovered windows at the front of the room are to be avoided at all costs. No one can look at a “back lit” facilitator for very long.

The temperature of the room will never be right for everyone. A simple rule of thumb, it is always better a bit cooler than hotter. Most of us can add a sweater if we get a little chilled (I am not talking about keeping the thermostat at 40 degrees), but there is a limit to what we can remove if it gets too warm. Plus warm encourages sleep.

If you have a thermostat in the room, put one person in control. If everyone is jumping up to swing the setting from one extreme to the other, you end up with anarchy and a very uncomfortable, distracted meeting.

Lighting is the other variable that makes a big difference. Bright light keeps everyone more awake and alert. If your presentations require a projector, get one that works in full light. Where you need to dim the light to see a projected image, try to turn off (or unscrew the light bulbs) that are right above the screen. That way, the working space is still well lit. Remember, dimmed lights (like too warm a temperature) encourage sleep.

Should there be a clock in the room? Since just about everyone will have a watch, you are not going to keep the time a secret. However, the preference is to have the clock, if there is one, in the back of the room. It becomes the official clock and can be used for timing specific discussions or to determine penalties for late returns from breaks.

(One way I get everyone back on time after a break or meal is to set the expectation based on the official clock – my watch if there is no clock in the room; I always pick an odd

time like 17 after – it is easier to remember; Then, if anyone is late, they have to tell a joke to the rest of the group; Not a big penalty, but one that seems to work.)

### Set Up

The actual set up of the meeting space will affect the levels and types of interaction. In a small group, keep everyone close. For three to six, small round tables work. Six to nine people can meet at a boardroom table. For groups over ten (and even for some groups as small as eight) the “U” or horseshoe shape is the most effective. There is more room to spread out, the seating is more flexible and facilitating the meeting is easier. A meeting of twenty people can be easily managed with this setup.

No matter which configuration you use, be very careful with where people sit. If there is a divisive issue to be discussed, do not allow the participants to create “us and them” seating. This will immediately set up confrontation and is to be avoided at all costs. Assign seats so that the “sides” will be mixed up. It forces conversation and reduces rancor. (See the next section on Seating Assignments for a more detailed review of the issues and suggestions.)

Whenever possible use tables that are thirty inches deep. The extra room is worthwhile and provides sufficient space for food, drink, notes and even a laptop computer. Provide enough room for the facilitator to move comfortably in the middle of the “U.” Good facilitators know how to use this space to defuse conflict and to encourage discussion.

In some situations, where there will be significant time set aside for work by smaller groups or committees, the use of “3/4 rounds” makes sense. Set up round tables where seating is only provided around three quarters of the table. Plan on four to six persons per table. That way, everyone can be set facing the front, but they are ready for individual discussions or working breakouts.

Try to not use tables normally set for ten or twelve people. Participants are too far apart for a workgroup. They have to yell to be heard and either disturb the rest of the room, or just drop out of the conversation. When using rounds, the seating rules below still apply.

The chairs should be as comfortable as possible. Chairs on wheels, which can tilt, have a height adjustment and can swivel are best. Inexpensive stacking chairs do not work as well. They are uncomfortable and increase fatigue just when you need everyone’s fullest attention. If folding chairs are the only option, include more frequent breaks. If at all possible, give participants a reason or permission to move around the space and stretch.

Some facilities can provide a sofa or two in the room. These work best in small informal groups where the ability to be more comfortable and to change one’s location improve the conversation. The larger the group and the more formal the meeting, the less positive value will be added.

### Seating Assignments

Probably the most overlooked environmental aspect of the meeting is assigned seating. Most meetings allow random seating based on “first come, first served.” This mentality leaves your meeting’s success to chance. People will select their seats by cliques and egocentric arrangements that can reduce communication and encourage factionalism.

In advance of the meeting, establish the seating charts. Do not leave it to chance. There are a few simple rules that will improve the meeting. First, separate people who work together or are “best friends.” This will minimize side conversations. Next, intermingle ranks and reporting relationships. If there are “sides,” make sure they are interspersed. Keep power players separate.

Then recognize that specific seats have differing amounts of power associated with them (see figure one). Put your most powerful attendees in the weakest seats. It allows the facilitator to control their contribution as opposed to fighting against them if they attempt to

overwhelm the meeting. By the same token, the strong seats help your shy or less vocal participants be heard. It is easier to draw out their ideas and comments.

If there will be working meals in a separate room, then arrange seating for that location as well. The same types of rules may apply. Any time you want to have open discussion or idea generation, mixing people up encourages new input and viewpoints. If you need to make decisions or want to take specific actions, then grouping people by department, responsibility or rank may be appropriate.

Set the room with name tents so everyone will know where they are to sit. Tents can be made out of any paper, but a heavier, card stock is better. You can hand print the first names in large letters or let a computer print the names in 70-point type. This is the easiest way to get people to go where you want them. Always bring a couple of blanks and a large marker pen for the inevitable correction, new person or unexpected guest.

Name tents have the added advantage of helping the facilitator remember names. If your group meets infrequently or has many new faces, name tents help everyone get to know each other. By including the name on the back of the tent, it will help each person's neighbor to remember names as well.

Use special markings (Group A, B or C; Meal table 1, 2 or 3) on the inside of the tent to indicate where each person is to sit for breakouts, meals or other functions. Then have identifiers that match the codes on the tables to be used. This is an easy way to control the groups for breakout sessions and to encourage "mingling" during meals.

### Timing

Time is so very important in our busy lives. Time away from work can be intimidating to some, loathed by workaholics and considered a vacation by others. A small amount of consideration will go a long way to increase the effectiveness of any meeting.

To begin with, Monday mornings are tough for many people. They want to be able to get their teams started for the week and catch up on the weekend activities before being out of the office for a full day or more. If they are flying in, missing Sunday dinner with the family is another imposition that may not be appreciated. Friday afternoons are another time to avoid. The mind leaves for the weekend long before the body can join. Use these days only in conjunction with a weekend retreat.

Weekends themselves offer unique possibilities for non-profit groups. It may be easier for the businessperson to give the meeting their fullest attention. If the meeting is planned far enough in advance, it is possible for the individual to plan other activities around the meeting schedule.

Where possible, start morning meetings before the business day begins. Any meeting that starts after the beginning of the day will start late. It is almost an unwritten rule of life. If you give busy people the opportunity to go to their desks before going to the meeting, something will delay them – guaranteed. Start with a light breakfast for the early risers and to give them a reason to miss traffic if driving to the meeting location. Do not start the meeting later than 8:00 A.M. if you want to begin on time.

Lunch is another good starting time. It is a natural break time in the day and people will usually find they can leave to get to your meeting on time. Call the lunch for 11:30 and beat the lunchtime traffic. The actual meeting may not start until 1:00, but by then everyone (even the "always late" people) will be there and ready to go.

3:00 or 3:30 is the best afternoon time, especially if you will meet into the evening. It gives everyone time to get most of their work done for the day and still avoid rush hour traffic to get to the meeting location. If people are flying in, it saves an extra overnight away from home and allows all but the West Coast to East Coast flyers to get there easily on the same day. Just like lunch, start with a coffee/cookie break so there is a buffer to reward the "on-

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timers” while waiting for the later arrivals.

Even though you have set a time, what do you do when some are late? One thing is to set up a penalty in advance. Having to tell a joke works. Also a donation to the organization is a good idea. The big question is: when do you really start? What if the head of the committee is late? What do you do? Waste everyone’s time while you wait for the leader to show up or try to start the meeting missing the most important participant?

The easiest way to solve this problem is to not appoint chairs who are always late. Now that you have had a good laugh, consider having all of the material to be distributed in YOUR hands in advance. That way you can hand the material out to be read while waiting (of course, you have sent this material to everyone in advance, but we all know few if any will read it and even fewer will remember to bring it with them).

Next, be prepared to call the meeting to order and get all of the administrative out of the way. Approve the previous meeting minutes and what ever else can be done without “you-know-who.” Then have the non-controversial reports given. When all of the updates are done, the gossip completed and the chair is not there, it is decision time. A decision must be made and is different with each group and meeting. Your two choices are to (1) start the meeting without that person or (2) cancel the meeting and let everyone go home, back to work or to the golf course.

One sneaky way I try to keep from being in that position is to call a special meeting of the leadership just prior to the main retreat getting started. My goal is to have all of the critical ears at the meeting location an hour ahead of the start time for the retreat. If it is an 8:00 a.m. meeting, we will have an executive breakfast at 7. Some people are just always late – work around them as much as possible.

Finally, watch out for holidays, especially the religious kind. Many meetings have become disasters because the date was picked without regard to the tremendous diversity in our volunteers today. The very people who will be offended may not recognize a conflicting date in advance and only at the last minute realize they cannot attend. Then they wonder if you did not care about their participation or are prejudiced against their group. Check the calendar carefully and specifically ask about upcoming celebrations.

Breaks are another important issue. If there are smokers in the group, then breaks may have to be more often and longer or you will lose their input. Normally, a good facilitator will recognize the need for a break and call one as necessary. We normally agree in advance that everyone will break at the same time. Our rule is anyone can request a break and then we all go at once. It minimizes the distractions and keeps everyone in all of the discussions.

A good rule of thumb is that a break should be taken at least every 90 minutes. Ten to fifteen minutes is a reasonable length. If it is longer, you will lose attendees to phone calls and emergencies that they had time to find out about. Where you are on hard chairs or the environment is less than ideal, more frequent stretch breaks are most appreciated by all of the attendees.

Meal breaks are usually thirty to forty five minutes. A working lunch or dinner may last longer, but always allow an extra fifteen minutes after every meal for nature breaks and to move around without the group. Do not serve alcohol at any meal where you will want people to return to the meeting after eating.

Where possible, a coffee / break service should be in the room at all times. Today, it is important to include regular and decaf coffee, regular, diet and decaf soda (soft drinks), regular and decaf tea and bottled water. In the morning provide some type of pastry choice (donuts, pound cake and bread / bagel). An hour or so after lunch, bring out an assortment of cookies (chocolate chip if I am your facilitator) or sweets to raise blood sugar levels. Munchies for meetings after dinner depend on the individuals in the group. Fresh fruit is appreciated all day long.

### Meals

A whole book could be written on meals at meetings – and there is a wonderful chapter on the topic in this book. Here are just a few simple suggestions to consider. Begin by surveying (or knowing well) all of the attendees to find their eating preferences. Make sure you know about any special dietary needs (for example: Kosher, Vegetarian, Low salt, etc.).

Next, keep all meals light. Serve a full steak dinner for lunch and watch your attendees sleep most of the afternoon. Sandwich and salad buffets are nice and give everyone a choice of what to eat. Breakfast buffets work as well. Oatmeal is very appreciated by attendees who watch their cholesterol. Juices should include at least one alternative to orange.

If you want to work through meals, consider using that time for discussions. Have each table report back to the group after the meal is done. It is a great break from the meeting routine and encourages people to meet others if you mix up the seating.

Beat the hunger pains if at all possible. That means to serve breakfast as early as people can be expected to arrive. Lunchtime should start between 11:30 and noon. Dinner is appropriate any time after 5:00. If space and the agenda allow, have the meals in a different room. The change of view is invigorating for the mind and helps people perform at their best.

### Props

Most retreats require a small number of props to help them run smoothly and to organize the effort. Flip charts are the most used item at any retreat. For most retreats, two easels are best. One is used for keeping notes and the second is an “idea parking lot” to capture great thoughts for later discussion. The second easel also allows you to be prepared if the first one runs out of paper without interrupting the meeting to reload.

There are many types of paper you can use today. Standard sized flip charts are not standard, but can easily be found in 27 by 34 inch pads. Some people prefer to have lines or squares preprinted to make it easier to write straight. Check with the meeting leader or facilitator to find their preference. Then make sure you start with a (relatively) full pad. Keep the “one or two sheets left” pads for use at the office.

Since most flip chart writing ends up on a wall somewhere, either “post it” note type sheets; “static cling” sheets; or masking tape will be necessary. Check with the facility to see if they have rules against using tape on their walls, wallpaper or only painted surfaces.

Also check that the paper is of sufficient weight (thickness). That way, you can write on a sheet already hanging on the wall without leaving a reminder of your visit on the wall behind the sheet. Cleaning wallpaper can be very expensive.

There should be a set of at least three colored and one black marker. The longer the retreat, the more important it is to have spares. If the facility has a white board, be careful not to use permanent markers on their board.

As a quick hint to make life after the meeting easier, number each sheet as you start it in the upper right corner. This makes it easy to get all of the charts in chronological order no matter how many you have used or where they end up on the wall.

Some meetings use electronic white boards so that copies of each chart can be produced (without transcription) for each attendee - while at the meeting. These are nice, but at the end of the meeting, you may not have all of the notes that were added by individuals after a sheet was passed out.

Another prop that has become common in many retreat environments is the “Talk Ball.” All too often, our board members like to interrupt or carry on multiple conversations. A simple ball, toy animal or other fun prop can be used to designate who has the floor. Until that item is passed, no one else can speak. It makes it easier for those that need a second to collect their thoughts to finish a statement without worrying that someone else will jump in if there is one

half second of silence.

Other toys can be used effectively if there are high levels of tension. People can be given “smiles” on a stick to wave when being facetious. Like an “ 😊 ” at the end of an email.

### Other

Here are a few final ideas to help the meeting be as successful as possible. Each will improve the environment for thinking and contributing.

First, have all beepers, cell phone and wireless email devices turned off! If someone absolutely needs to be reachable, set the device to vibrate. Ask them to alert their staff and family that they are at an important meeting and are only to be interrupted for a real emergency. Remember, any interruption is an excuse to leave the meeting.

Arrange for the meeting facility to accept calls (if available) and take messages. These can be brought to the room in an emergency. Otherwise, they should be taped outside the door to be picked up at breaks.

Second, all egos and titles are checked at the door. Most retreats depend on sharing of ideas and thoughts. If one or two people are going to be allowed to dictate the answers, then why hold the meeting? Everyone has something to add or you are inviting the wrong people. Inside the room, it has to be a level playing field to get the most value from the attendees.

Third, there is only one conversation at a time. Very few people can keep up with and participate in multiple discussions. And it is impolite to ignore what another person believes to be an intelligent addition to the discussion. Let everyone have his or her say and rely on a professional facilitator to control the time everyone takes.

Fourth, break together. The mood is easily broken if people are constantly getting up and leaving the room. You may even encourage conversations to be held outside the room destroying the advantage of meeting together. Do not lose anyone’s participation. When someone needs a break, let them request it. Then everyone goes and returns at the same time. It is then easier to build consensus and a sense of “team.”

Fifth, prior to the meeting, send a formal invitation. Include the agenda to be followed, a list of the objectives, all meeting details (include time, location, instructions for parking and where to have messages sent) and any “homework” that is to be done in advance.

Sixth, have pencils, pens and paper for the attendees. It is inconceivable that an otherwise intelligent board member or staffer would come to a meeting unprepared, but it happens all of the time. If reports were distributed in advance for review, have extra copies to hand out onsite.

Finally, provide a report at the conclusion of the meeting. Include copies of flip charts or just a summary of what was accomplished. Know your audience and take care of their needs. This includes all of the people that did not participate but will be affected by the outcome.

### Conclusion

Retreats are a valuable means of achieving many ends. Goals, agendas and process are as individual as the organizations, attendees and facilitators. Yet all have to be held in a physical environment. While the best environment in the world will not save a poorly conceived or managed retreat, it can greatly enhance the potential for success.