Lesson Number: **RNH.11.2**

Leadership Retreats

Purpose:

The purpose of this lesson is to teach students how to organize and manage effective leadership retreats.

Quick Reference:

Time Required:
75 minutes

Objectives:
After completing this lesson, students should be able to:

1. Describe an effective leadership retreat.
2. Explain the value of an effective retreat.
3. Describe the five-step process for conducting a retreat.

Materials:

- ✔ Writing Surface
- ✔ RNH.11.2.AS.A – one copy cut up for groups
- ✔ RNH.11.2.AS.B – one per student
- ✔ RNH.11.2.AS.C – one per student

Directions:

A retreat is a gathering of a selected group, such as a chapter officer team or executive committee. Often retreats are conducted at the beginning of the officers' terms and function as a means of preparing the team for its upcoming year of service. This could include planning the chapter activity calendar, leadership training, and team building.

It is critical that advisors properly prepare newly elected officers for a successful year of service. We cannot assume that, because they have been elected, they are equipped with the skills and knowledge to effectively assume their given responsibilities in leading the chapter. Explain these concepts to students. Ensure they generally understand what a retreat is before beginning the activities below.

1. The Value of Retreats – An extensive, well-planned officer retreat should be a major component of a chapter's comprehensive leadership development program. Pose the question, "What are the positive impacts a retreat can have on our chapter/membership?" Highlight the points below in your conversation with students or record them on a writing surface as they are mentioned.
    a. Planning—calendar of events, Program of Activities, meetings, and other specific activities.
    b. Leadership development
        i. Specific officer duties (i.e., writing minutes, delegation, budgeting, writing news articles, conducting activities at meetings, preparing agendas, parliamentary procedure, etc.)

ii. General leadership skill development (introducing speakers, presenting awards, effective communications, writing thank-you notes and letters, speaking skills, proper use of a microphone, listening skills, etc.)

iii. Team-building skills—building trust, conflict resolution, group decision making, accepting diversity

iv. Goal setting—personal, team. and chapter

v. Recreation—fun and getting acquainted

vi. Personal assessment and reflection time

2. Five-Step Process to Conducting a Retreat – Break students into groups and assign each group one of the steps to present.
    a. Distribute RNH.11.2.AS.A.
        i. You may want to cut RNH.11.2.AS.A up for so each group has only their section.
    b. Give groups a few minutes to prepare before presenting.
    c. Allow each group to present.

Think about how you can challenge your students to take charge of planning a leadership retreat. How can you prepare and empower them for this task?

3. Ask students to consider what they think they need to accomplish during a retreat. Write their ideas on a writing surface. Indicate that you have some specific items you feel need to be covered. These might include:
    a. Setting team goals
    b. Setting chapter goals
    c. Reviewing officer duties
    d. Ceremonies practice
    e. Program of Activities (POA) development
    f. Team development

Challenge the students to plan the retreat by giving them the specific items you want accomplished, a time frame (e.g., a three-day retreat), and a budget. You can do this as a mock exercise or let them actually plan the chapter's retreat. Either way, it will be a good learning experience. Make sure they schedule time for recreational and team-building activities.

4. Distribute RNH.11.2.AS.B, "Leadership Retreat Planning Worksheet," and have students use it to plan their retreat.
    a. If the officers are planning the retreat, they should do it as a group. If you're implementing this activity as a class exercise, break the class into groups of four or five students.
    b. As part of the planning, you may want to instruct students to include several blocks of time during which you will lead the discussion.
        i. For example, you may want to set the tone for the retreat by hosting the first session. This might include laying a few ground rules, discussing the overall retreat and a get-to-know-each-other activity such as the example given in RNH.11.2.AS.C. This activity, "Me in a Box," is an example used to get a group of officers to share their values, hopes, and aspirations with others in a nonthreatening way.

Connection Questions:

1. If you have ever been to a camp, what are some of the similarities you see between that experience and a retreat? Differences?
2. If we were to plan a retreat for our freshman students, what would be the things we should focus on creating for them? (This question can focus on content, activities, etc. Feel free to guide students or not.)

LifeKnowledge Connections

Precept(s) Addressed:

Action

A3. Plan effectively.
A5. Communicate effectively with others.

Relationships

B1. Practice human relations skills including compassion, empathy, unselfishness, trustworthiness, reliability, and listening.
B2. Interact and work with others.
B5. Participate effectively as a team member.

Character

D2. Accurately assess my values.
D4. Respect others.

Awareness

E2. Perform leadership tasks associated with citizenship.
E3. Participate in activities that promote acceptance and appreciation of diversity.

Communications

M3. Makes effective business presentations (presentation software, demonstrations, and speaking).

Flexibility/Adaptability

O3. Reacts with openness to feedback and professional growth opportunities.

LK Lesson Suggestion:

MS.21 – Travel and Dining Etiquette
MS.45 – Planning a Public Presentation
HS.85 – Magic Formula of Presentation Planning
HS.87 – Developing Workshops Using the Magic Formula

Five-Step Process to Planning a Retreat

1. Assess the newly elected officers and evaluate resources.
    a. What skills do they need to develop?
    b. What is the maturity level of the officers?
    c. What is their level of commitment?
    d. What resources does the chapter have available (financial, human, time, etc.)?

2. Develop ownership for the retreat.
    a. Ask the officers to play a major role in planning the retreat.
    b. Have officers lead sessions—discussion of issues or topics, conduct activities, etc.
    c. Give officers responsibilities for meal preparation, games, etc.

3. Identify learning outcomes.
    a. Determine what skills will be taught.

4. Design the retreat.
    a. Retreat site considerations:
        i. Try to conduct the retreat off campus and not at an officer's home. There are too many possible distractions and, generally, officer enthusiasm and energy levels are increased when you rent a cabin or camp at a beautiful site.
        ii. It may be advantageous to find a site with nearby entertainment and shopping facilities of which officers could take advantage.
        iii. Check on nearby sites that offer ropes or challenge courses, if resources are available.
        iv. You may want specific amenities, such as electricity, if you plan to use computers or audiovisual aids.
    b. Design the workshop sessions.

Five-Step Process to Planning a Retreat

5. Implement the retreat
    a. Create an agenda that details items such as:
        i. Session names with descriptions
        ii. Meals
        iii. Breaks
        iv. Recreation and evening activities
        v. Starting and ending times for all events
    b. Carefully plan the first session. The tone for the entire retreat is established here. Take time to set the norms for behavior and expectations, but send a clear message that the retreat will be fun, interactive, and educational.
    c. Build a sense of community with the team. Create a warm, non-threatening, supportive environment that will enhance participation and learning.
    d. Provide "free time" for the officers to visit and get to know each other in an informal setting.
    e. Close the retreat with a special motivating activity, perhaps a graduation installation ceremony of some kind. This puts a special touch to the retreat and sets the stage for a successful year together.

Name: _____

Date: _____

Leadership Retreat Planning Worksheet

1. Who will attend the retreat? List each person. _____

_____

_____

2. What are the objectives/what should be accomplished during the retreat?

_____

_____

3. How long will the retreat be? _____

_____

4. When will the retreat be? _____

_____

5. Where will the retreat be held? _____

_____

6. How much will it cost?

- lodging _____ - meeting space _____
- Food _____ - transportation _____
- materials _____ - audiovisual equipment _____
- other (ropes course, recreation, speakers, etc.) _____

(Hint: you might want to assign one of the above items to each committee member to research)

7. How will the retreat be funded? Who will pay for the expenses? _____

_____

Leadership Retreat Planning Worksheet

8. Will the retreat have a theme? If so, what will it be? _____

_____

9. Will meals be prepared for you or will attendees have to prepare them? If attendees will prepare meals, who will purchase groceries, prepare meals, clean up? _____

_____

_____

10. Will you be staying in a full-service hotel, a dorm-type facility or camping out? What will each participant need to bring in the way of linens, bedding, towels, etc.? _____

_____

_____

11. What will your transportation be? School vehicle(s)? Rented vehicle(s)? Private vehicle(s)_____

_____

_____

12. How will you evaluate the retreat? How will you determine if it was successful? _____

_____

_____

13. Attach an outline of your retreat that includes presenters, topics, activities, a detailed schedule, and a budget.

Me in a Box Activity

This activity is a good way to get a group of officers to share their values, hopes, and aspirations with others in a nonthreatening way.

To implement this activity, give students the assignment about one week before leaving for the retreat.

1. Tell each person that they are to bring a box that contains five or six items that represent their goals and what they value.
    a. These can include photos, knickknacks, items of clothing, or just about anything else that can fit in a box.
    b. You should also prepare a box representing your goals and values.
2. At the retreat, ask each person to bring their box to this session.
3. Announce that during this session each person will share their items and what each means with the group. You should explain your items first and set the example. This should be a serious session, not that it won't contain laughter, but you should also be prepared for tears as the students explain what is meaningful to each of them.
4. When each person has shared the contents of their box, discuss the common elements.
    a. Most groups will hold family and faith as common values.
    b. Additionally, agriculture and FFA are often a part of the common elements.
5. After the session, each person in the group should feel like they know more about their fellow participants and have a better understanding of each other's values and goals. This will help each value the others and help the team solidify.