Leadership Retreat Planning Guide

Comprehensive and effective leadership transitions are a key pillar of success for sustainable Net Impact chapters. It is essential that outgoing chapter leaders share their knowledge and experience with new leaders, and one of the best ways to do this is to host a leadership retreat.

This guide will help you by providing an overview of the crucial components of a leadership retreat, from planning to execution to follow-up.

Six stages to planning a leadership retreat

1) **Assess concerns, needs, and desired outcomes as well as the preferred format for the retreat:** In the most general sense, think about what you want your retreat to accomplish. Since we’re focusing on leadership transitions, think about what you’ve learned in your time as a chapter leader that would be important to pass on, what you wish you’d known when you started out, and how what you’ve done can be improved upon.

2) **Set clear, achievable goals for the retreat:** Identify what kind of learning needs to take place (knowledge, skills, attitude, etc.) and think about milestones that demonstrate achieving this learning. Naturally, the retreat can’t cover every detail of a leadership role, so prioritize your learning goals and objectives to cover the most important topics that will help the new leaders.

3) **Determine the activities, content, and programs which will best accomplish the retreat objectives:** Some information is best transferred over a casual but focused conversation while other topics mandate a lecture or require collaborative effort to troubleshoot solutions. If you need to talk about chapter finance, it might be best to have the chapter’s finance leader to give a presentation. If you are reflecting upon the successes from the past year and brainstorming improvements for the coming year, you will want to have either large or small group discussions.

4) **Make logistical and budget arrangements and delegate responsibilities:** Choose a space conducive to the kind of discussion you want to have and to your budget. Good places to meet include hotels, campus offices/rooms, parks, campgrounds, or private homes. But meet wherever you think will produce the best discussion and bring your group closer together. Include in your budget any supplemental resources or materials you want to use (food, activity supplies, and transportation costs to name a few). And finally, make sure that everyone has a stake in the success of the retreat by delegating responsibilities for planning and executing the event (even if it’s just reading an interesting article for a group discussion or thinking about one thing they liked about last year).

5) **Execute the event with ample planning and time available:** It’s a good idea to set at least a basic agenda to make sure the retreat runs smoothly and feels organized (though you should include some time for organic bonding to arise). Also, be sure to give yourself enough time to cover a substantive amount of material. Get set up early and clean up afterward!

6) **Evaluate/follow up with organizers and participants afterward:** Check in with attendees afterward to see if they felt like they gained anything from the experience, note what did or didn’t work, and how the experience can be improved upon for next time. Also, make sure to keep the retreat’s reflections in mind for chapter functions afterward!
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Important Agenda Items

These items were taken from a planning guide produced by Wartburg College, an excellent resource to take a look at in planning your retreat. You can find it at the link below: http://www.wartburg.edu/orgs/leadership/retreatplanning.pdf

Your retreat should include:

- An opening activity / icebreaker
- Meals and prep time to cook / clean-up
- Both large and small group activities
- Unstructured time to allow organic thoughts to take shape
- Breaks
- Group interaction and discussion
- Sufficient cushion time in the event that activities run long
- Evaluation and assessment

Sample Icebreakers

Games and activities to break the ice are essential to get a group to be comfortable with each other, especially if some group members don't know each other well. You should tailor your icebreaker to reflect your members’ age and knowledge of each other, but below are a few ideas to get you started.

1. **Sea to Shining Sea: (conversation, group collaboration):** For this exercise, you’ll need one facilitator. The facilitator stands at one end of the room and says “I am (insert major US city in proximity to their place of birth).” Then, everyone in the group must arrange themselves in a line based on where they were born, in order of proximity to that city. This forces everyone to talk to each other, and reveal a minor detail about themselves (where they were born) in order to figure out the accurate ordering and achieve the overall group objective.

2. **Red vs. Black: (team work & community):** Split group into two teams that cannot hear or see each other. Each team needs one leader and one messenger. There is a scoreboard with 9 rounds (similar to a baseball scoreboard), and in each round each team must decide to play red or black. The leader ultimately speaks for the group after discussion, to the messenger, who impartially reports Leader’s decision to the moderator. Read the rules exactly as follows to each team: “The premise is to win. To win, you must accumulate the most number of positive points on the board. If both teams play black, each team gets 1 point. If one team picks black and the other red, the team that picks black loses a point and red gains 2 points. If both teams pick red, both teams lose a point.” Going round by round, each team chooses a color and reports to the moderator. The moderator then announces the total for that round, before moving on to the next round. DO NOT announce the following, but keep it in mind: This game is a reiteration of the famous “Prisoner’s dilemma” experiment. It investigates our competitive vs. cooperative tendencies, as well as whether or not we are disposed to vengeance. The rules do not say it is a competition. Clearly, if both teams pick black every turn, the maximum number of total points will be posted. But if either team picks red in hopes of gaining a lead over the other team or out of retribution, competition will swiftly lead the entire scoreboard into the negative.
3. **Cross the Line: (trust and empathy):** For this icebreaker, you will need a designated moderator who will split the remaining individuals into two even groups. The two groups stand shoulder-to-shoulder in two lines facing each other with enough space between the lines for everyone to see down their line as well as the full group across from them. The moderator should stand in the middle and have a list of questions and statements that range in seriousness from lighthearted and funny to very personal and introspective. The moderator reads a question and those people who wish to answer in the affirmative take one step forward, “crossing the line” to publicly display their stance and to be witnessed by the whole group. After a pause to let everyone see who “crossed”, ask them to step back to their line and proceed to the next question. “Line crossers” should all step forward as quickly as possible, to have some sense of unison and support, as some of the steps may be hard to make publicly. Examples of lighthearted or funny statements might include “I have tried crying my way out of a ticket before” or “given the choice between cats and dogs, there is no question that dogs are superior.” More serious examples could be “I have felt ostracized/betrayed by a group I’ve led in the past” or “this leadership opportunity and its responsibilities are a little bit intimidating, but I know I can succeed and am excited to overcome my doubts.” Questions should start simple and funny, but dig deeper into issues that need to be faced or deserve to be acknowledged. **Note:** make sure participants understand no one is forced to step forward if they don’t want to.

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**Discussion questions to ask during the retreat**

To begin, it’s important to get to know what experience your retreat participants have had with Net Impact. Some good questions to ask are:

- How did you learn about Net Impact?
- Why are you excited about Net Impact?
- What’s the best Net Impact event you’ve attended and why?
- Why do you want to be a chapter leader?
- What are some new ideas you have for the chapter this upcoming year?

These questions will get your group more acquainted with each others’ connection to the chapter. Especially if there are new leaders, they will help you identify the most productive ways your chapter conducts outreach and engages its members.

Additionally, in the earlier stages of the retreat, it’s a good idea to reflect upon and recognize past successes and failures. Ask your group to discuss:

- What worked well this year? What didn’t work well?
- What went better than expected? Worse than expected?
- Who stood out as someone who really got things done?
- How did the chapter most improve this year?
- What’s the biggest challenge that the chapter has recently overcome, and what challenges face it now?
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As the retreat progresses, think strategically about where the chapter is and where it should be going. The following questions are taken from Peter Drucker’s “The Five Most Important Questions You Will Ever Ask About Your Organization” and can get you thinking about the general strategy of your chapter:

- What is our mission?
- Who is our customer?
- What does the customer value?
- What are our results?
- What is our plan?

Answering these questions will help your chapter and its leaders keep a sense of continuity and purpose in organizing events and carrying out activities. While your chapter doesn't likely have customers, it’s crucial to think about your stakeholders, what they value, and how you can deliver on creating this value.

It’s also important to consider what you think the specifics of your chapter’s future look like. Questions along these lines include:

- What kinds of events do we want to throw over the next year?
- How can we improve and expand our Impact Programs?
- How can we raise more funds and more effectively budget?
- How can we reach out to new members more effectively and more fully engage current members?
- Where do you hope to see the chapter in one year? Five years?

Conclusion

We hope this has started to get you thinking about the important elements of a leadership retreat. Retreats are an excellent time for both growth and reflection, and are a crucial bridge between old and new chapter leaders.

Feel free to contact the Net Impact Community Team at chapters@netimpact.org if you have any questions or suggestions!