A well designed staff retreat can accomplish many things and have a tremendously positive effect on your organization. In this setting you can share information, build team spirit, identify and reinforce best practices, validate everyone’s position (often by having a variety of people report about what they do), and reward good work.

Perhaps most importantly, staff retreats provide a unique opportunity to hear from the many voices within your organization in an informal, participatory venue. Staff retreats are really about improving communication and creating the type of organization in which you – and others - want to work.

A retreat is an opportunity to:

- Meet for an extended period of time away from the office and the daily pressures of business
- Become informed about the organization’s policies and general operations which are usually handled by managers
- Inform the entire staff about developments and to discuss trends in light of these developments
- Review past performance, resolve current difficulties and plan the organization’s future
- Identify organizational goals and build consensus
- Provide everyone on staff with a “state-of-the-organization” update

As conference planners, we all realize the importance of logistics. Here are some considerations:

- Timing – scheduling the retreat as a wrap-up to your fiscal year or as a kick-off early in a new year often makes sense
- Use of an outside facilitator – this may or may not add value to your retreat, depending on how clearly identified your retreat goals are and how prepared you are to manage the process
- Location – getting away from the office is the key. Inclusion of amenities and the “fun factor” – make sure to include these
elements! Remember, this is as much about team building as it is about educating
- Cost - again, remember this is an investment in your staff - think both in terms of educating and rewarding

Planning your schedule. After identifying your specific objectives, perhaps the most important considerations are how to keep it relevant and interesting. The retreat goals you have set should direct your selection of specific topics. For staff enrichment topics you may wish to involve outside experts. Brainstorming sessions can examine a problem or organizational procedure. Topics designed to promote organizational culture/team building can be presented in a variety of formats, and the “fun factor” is an absolutely essential element of every retreat. Be sure to create a schedule that you can keep moving and that facilitates involvement. Here are some tips to consider:

- Don’t dominate the schedule - have many different individuals present
- Keep the topics short
- Stay flexible - it’s important to maintain interest, so “go” with the discussions that are working
- Intersperse the serious topics with fun - prizes, games, etc.
- Choose topics everyone is interested in
- Use breakouts where appropriate - in other words, make the topics interesting to everyone - if they aren’t of value to everyone, you should use breakouts to give everyone a topic they care about
- Make it a relaxed schedule - don’t overwork the group

Here are some retreat elements that have worked well:

- Reports from individuals or departments about what they are doing (good for the left hand to know what the right hand is doing)
- Customer service topics - some of our case studies have worked really well and been very fun (and funny)
- Dealing with difficult customers or other “how to handle it” topics
- Year in review - both successes and failures
- New products released or about to be released
- Website developments
- Boat rides or other “passive” social events
- Casual dinners are big successes
- $25 gift cards are winners
- Some games have worked well
- Outside voices have worked well
- “Good Idea” contests
- “Best Practices” discussions
- “How to improve quality” discussions
- Copywriting exercises
- Review of focus group or other market research results

And, with experience as the teacher, here are some things that have worked less well:

- Attempts at complex planning (brainstorming sessions do work well, attempts at detailed planning do not)
- Too many separate breakout sessions - avoid doing things that don’t build camaraderie
- Overly strenuous schedules
- Failure to set clear expectations for what is to be accomplished (satisfaction is a function of expectations)
- Group decision-making (this is a bad idea)
- Topics that too few care about
- Topics that take too long
- Games that might embarrass or are too difficult

**YOU CAN’T DO THAT!**

Be prepared. Objections to your holding an all-staff retreat, especially if it is a new experience, might come from both within and without.

Here are some possible objections which might be raised, but keep in mind that organizational culture is a key to success in the CLE world. It is not just what you do but how well your organization does it. Plan carefully to address and eliminate objections such as these:

- This looks like a boondoggle for the staff.
- These end up being all social and not substitutive.
- There is no reason it can’t be done in the office around the conference table.
- What about the liability issues if you go off-site?
- There is no money in the budget for it.
- Every other department will get in line to have a retreat.
- Retreat reports and conclusions just end up gathering dust on the shelf.
- Law firms only take partners, not peons on retreat.

In conclusion, ten suggestions for successful retreating:

- Get away from the office – to a pleasant non-work location
Set clear expectations for the event – we suggest that you do this with a short kick-off talk – tell them that the purpose of the retreat is to thank them for their good work, to create teambuilding and to share information so we all have a better understanding of what everyone else is doing – don’t set unattainable expectations such as completing the “plan for the entire next year” – too hard to accomplish.

Make it fun – team building and thanking your employees is the top priority.

Make the amenities nice – don’t be cheap with your employees – treat your employees like they are important to you (hopefully, they are).

Don’t make the schedule grueling.

Make the topics of broad general interest as much as possible – and add one or two carefully selected outside voices.

Keep the discussions brief.

Give a good number of employees a chance to talk about what they or their department are doing.

Have lunches, dinners and entertainment events together.

Wrap up the retreat with upbeat remarks and again thank them for their good work. Remember, retreats are about staff recognition as well as education.

A staff retreat can be the catalyst to make your CLE organization more creative, more productive and most importantly, more like the organization in which you and your colleagues want to work. Minnesota CLE and a number of other CLE organizations have found the annual staff retreat to be a terrific investment. The returns in terms of innovation and best practice suggestions far exceed the cost. Good luck with your retreating!