Best Practice in Conducting a Virtual Retreat

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Description of Practice:

A guide for hosting a virtual retreat for team members that are not located in the same physical space.

Prospective Users of Practice:

- Managers with remote employees

Issue Addressed:

Statistics indicate there is an increasing number of remote employees in the workforce, especially in the technology fields.

Team building for teams that are geographically dispersed.

Desired Outcome:

Organizations begin to explore alternatives to expensive, time-consuming, face-to-face retreats.

Organizations become more receptive of and prepared for a work environment where team members are not all located in the same physical location. Organizations benefit from a broader pool of talented applicants when they are receptive to remote team members.

Team members who work remotely demonstrate the same level of cohesiveness, commitment, communication, collaborative strength, accountability and overall efficiency as those who work in the same physical location.

Process:

Determine the scope of your retreat.

- How many people will be attending?
- How long will the retreat last?
- What is the budget for the retreat?

Establish goals for the retreat. What do you want to accomplish?

- Team building
- Strategic planning
- Staff appreciation / awards
- Skill building
- Other types of goals specific to your organizational needs

Identify a software platform for the retreat, which may be driven by the number of attendees or limited budget.

- Google Hangouts
- Skype
- WebEx
- GoToMeeting
- In some organizations such as universities, an online learning platform may be available.
- Will you also need a teleconferencing solution? i.e. some participants who will be on video as well as phone

Plan the retreat

- Establish a committee to plan the retreat.
- Dedicate time to the planning process.
- Identify the retreat leader or primary facilitator.
- Coordinate the selection of a date and time with attendees, and send out invitations as early as possible in the process.
- Before the retreat make sure to test the technology platform with each attendee to reduce the probably of technical problems on the day of the retreat.
- Select a theme for the retreat, and carry that theme throughout the event's activities.
- Determine if you will be supplying materials to support retreat activities, such as t-shirts or other branded items. Order and mail these materials to attendees well in advance.
- Create a working agenda for all time slots during the retreat. Identify what activities will be going on at all times. In a virtual retreat you are more likely to have attendee's full attention. Once the agenda is finalized, inform attendees if they need to bring items or be prepared for specific activities during the day.
- Plan team building activities
- Plan lunch or lunch related activities
- Establish the ground rules for how the participants will engage with each other during the event. The primary facilitator will share this with the participants at the beginning of the event.
- Plan for after the retreat
  - Determine how you will thank attendees for participating.
  - Identify where you may need to follow-up on activity outcomes
  - Determine how you will measure success, such as a participant survey before and after the event
  - Determine how you will communicate your success to leadership and others in your organization, such as an article in the organization's newsletter

Goals of team building activities

- Build trust among your team members
- Increase the level of cohesion and intimacy among your team members
- Learn more about your team members on a personal and professional level

Examples of virtual activities

- Virtual office tour – Each remote team member shares what their workspace looks like
- Lunch game – Pick a theme for a brown bag lunch such as "what I ate in middle school" or "only leftovers" and then let each attendee tell about their lunch and vote on the best
- Virtual charades

- Story game – each person contributes a sentence one after the other to write a story
- Virtual coffee break / happy hour – have everyone bring their favorite beverage and pretend you are at the coffee shop. Or have everyone bring their favorite coffee cup and tell the story behind it.

Considerations during the planning process

- A virtual retreat can ensure a level playing field for all involved. Participants join in the discussions from their own space and experience the retreat in the same way, avoiding the isolation and disappointment that can result when only a portion of the team participates remotely.
- When planning activities, think outside the box! Focus on the team member's need to feel connected.
- Activities should be conducive to creating a psychologically safe and fun environment for the participants.
- A reduction in travel expenses may provide additional budget for the event.
- Utilize software tools to keep participants engaged, and facilitate activities such as breakout sessions, small group discussions, polls, etc.
- Design activities that enhance interpersonal trust, and foster team collaboration and communication.

AASP Recommendation:

Statistics indicate there is an increasing number of remote employees in the workforce, especially in the technology fields. We should begin preparing for a work environment where all team members are not located in the same physical space.

Staff retreats are a positive experience for team members, providing opportunities to connect or re-connect with the mission and goals of the organization. Retreats provide an opportunity for team members to connect with each other and organizational leadership. We should begin to experiment with and utilize technologies that will enable us to support the needs of our team members as they become more geographically dispersed.

Sample Policies & Procedures: