

This example can be used as a starting point to create a policy or other document for your own land trust, but should be altered as necessary to reflect your organization's unique circumstances using guidance found in the *Land Trust Standards and Practices Guidebook* text and corresponding Standards and Practices Curriculum.

Please Note: If you are using this material for accreditation purposes, see also [the Land Trust Accreditation Commission website](#) for additional information. To search for policies from accredited land trusts, insert <<accredited>> along with the search term (e.g., conflict interest policy accredited).

How do I use retreats in the planning process?

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A planning retreat is a meeting typically involving board and staff. It can be one to two days long, sometimes using a facilitator to help structure the process. Retreats are usually held away from the workplace or on weekends to ensure that participants can focus wholly on the issues at hand and are not distracted by the everyday interruptions of the office. Sometimes key stakeholders will be invited to join the retreat in an effort to strengthen the relationship between the stakeholder and the organization or to educate individuals around certain organizational issues.

Part of the value of the planning process is the opportunity for different elements of an organization to work together in defining the organization's future. Retreats can provide the means for achieving this aspect of the planning process.

When a Retreat Should Be Used

An organization can have a retreat at any time during the planning process, but the most common times are either at the beginning or at the end of the process.

Retreats may be organized at the beginning of the process to educate participants on the process or to build enthusiasm and commitment. These types of retreats are opportunities to begin collecting and processing information about the environment. Some organizations have external experts speak on different strategic issues that may be important to keep in mind during the planning process (e.g., changing client needs, potential duplication of services, or opportunities for collaboration, etc.).

Retreats may also be used at the conclusion of the planning process as a means to summarize the analysis and decisions developed during the process and as a communication tool to board and staff. Informing participants of decisions and ideas throughout the process will ensure that they understand and support the plan. The retreat, however, should not be used in place of this routine communication -- it is a time for recognition of commitment and contributions in addition to an opportunity for closure.

How a Retreat Can Be Formatted

Retreats are a combination of small and large group activities and discussions. The small group is used for extensive discussion and consensus building, whereas the large group is for reporting on small group activities, as well as brief discussions and final decision making.

It is important to have a well planned retreat that includes a formal agenda and planned outcomes distributed to retreat participants prior to the retreat. Michael Doyle and David Strauss' book, *How to Make Meetings Work*, provides an excellent reference guide to planning a successful retreat.

Benefits to Having a Retreat

A well planned and managed retreat can accomplish several key success factors that may enhance your planning process. They include:

- Encouragement of creativity - many people in group situations stimulate each other to think beyond traditional boundaries.
- Teambuilding for the organization - people work together more efficiently once they know each other (e.g., personalities, work styles, methods of communicating, etc.). Retreats provide an opportunity for staff, support staff, and board members to come together and collaborate for the first time.
- A foundation of common understanding - for many organizations, this is the opportunity for everyone to hear the same information and messages.

Drawbacks to Having a Retreat

Although using retreats may enhance your planning process, there are several potential drawbacks to having a retreat. They include:

- Consumption of critical resources - a successful retreat takes a considerable amount of planning. The process also consumes both cash and time resources.
- Pressure to produce results at the retreat - often the purpose of a retreat is to identify and discuss issues. Not everyone feels that this is an effective use of time, and the retreat can be viewed as a waste of time and other scarce resources.
- Generation of work the staff cannot or should not handle - participants often assume that because it was discussed, it should happen. Sometimes the group can feel overwhelmed with ideas generated and the planning process as a whole.

When a Retreat is Right for Your Organization

There are a few questions to consider when evaluating whether your organization should plan a retreat during the planning process:

- How knowledgeable is the board about the organization and how much will they be able to contribute in this setting?
- What outcomes are the different parties looking for in the retreat? How realistic is it that all outcomes will be accomplished?
- How willing are the board and staff to commit the preparation and participation time?

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