

Student Organization Retreat Planning Guide

Center for Student Involvement, Kansas State University
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What is a retreat?

A retreat is a planned time for your organization to step away from your normal routine for the purpose of reflection, learning, planning, teambuilding, and/or evaluation. Retreats provide the opportunity to rejuvenate members' motivation and enthusiasm for the organization, and to accomplish organizational goals and work.

A retreat is one of the most useful and valuable activities that a student organization can participate in.

How can CSI Help

The Center for Student Involvement is committed to helping you through this process. In addition to this retreat-planning guide, CSI staff are also available to discuss the topics covered in this guide, as well as provide handouts, workshop recordings, and presentation slides on a variety of leadership topics.

Included in this guide are several questions your organization may consider when planning a retreat. You can also find a to-do list at the end of the document to help guide your work.

Ask yourself the following questions:

- **Why - What is the purpose of your retreat? Why do it?**
 - It is important to identify your goals for the retreat at the beginning. This will inform and influence the remainder of your planning decisions.
 - To start identifying your goals for the retreat, ask your executive board members, senior leaders in your organization, and advisor:
 - What would you hope to achieve during the retreat?
 - What organization goals or business need to be accomplished?
 - What interpersonal goals or teamwork needs should be addressed?
 - This could include, but is not limited to:
 - Team Building
 - promote togetherness, strengthen a sense of community, build team spirit, improve organization dynamics, introduce new members, get to know each other on a deeper level
 - Skills Training
 - Functional how-to's for officer positions, organization management, how to navigate OrgCentral, where to store important files
 - Communication
 - Share important announcements and updates, give each individual a chance to share their thoughts and ideas

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- Goal Setting
 - Re-define or set organizational goals & objectives, set personal goals for individuals as related to the organization
- Planning
 - Set calendar of meetings and events for the semester/year, plan a large program
- Learning
 - Provide information, host workshop sessions, leadership development (communication, teamwork, problem-solving, diversity & inclusion, well-being, time-management, etc...)
- Orientation
 - Discuss the purpose of the organization, cover expectations, general operation procedures, timelines, important dates & events
- Officer Transition
 - Share important information related to each position, tips, tricks, lessons learned, need-to-know details to perform responsibilities
- Rejuvenation
 - Revitalize your members' enthusiasm, boost morale, motivate members for new semester/year, renew commitment to the org
- Reflection & Evaluation
 - Evaluate progress of long-term goals and objectives, past challenges & successes, review constitution
- Conflict Resolution
 - Resolve group conflicts, problems, review problem-solving techniques and expectations
- Have Fun!
 - Create a shared experience that positively unites members
- **Who – Who will plan, participate, and present at the retreat?**
 - Who will plan and organize the retreat?
 - President, advisor, executive board, captain, coach, committees
 - Consider assigning members to committees to plan specific portions of the retreat, including location, meals, transportation, accommodations, workshops, presenters, team-builders, etc...
 - Who will attend and participate in the retreat?
 - Members, new members, officers, new officers, senior leadership / executive officers, all organization members, advisors
 - Who will facilitate the content and present at the retreat?

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- Members, officers, committees
 - CSI provides resources to student organizations including recorded workshops, presentation slides, and worksheets/guides
 - Advisors
 - Alumni
 - Faculty
 - Division of Student Life staff
 - Trained facilitators
- **How – How will you budget to cover the costs of the retreat?**
 - Determine what expenses are necessary and can be covered by organization funds
 - If your members will individually be responsible for costs, provide clear communication in advance of this expectation
 - One cost saving tip would be to have each member bring various snacks, cooking utensils, bedding, etc...
 - Meals & Snacks
 - Plan meals and snacks in advance.
 - While some retreat sites offer meals with the rental price of the facilities, other sites expect that you will bring your own food or arrange for catered meals.
 - Consider the dietary restrictions of your members when planning meals.
 - If you plan to cook, delegate tasks to organization members (including menu planning, buying food, cooking, utensils, and cleaning up).
 - If arranging for catered meals, be sure to know how many people will be attending your retreat and if there are special dietary restrictions that need to be considered when planning the menu.
 - **When – When is the best time to have a retreat?**
 - The timing of your retreat may be influenced by your goals and agenda, also by the availability of your members, presenters, and location venue.
 - Time of year
 - Summer/Winter Break - longer get-aways, planning a calendar of events, officer orientation, & training
 - Beginning of Semester - new member introduction, closer proximity/ease of gathering
 - Mid-semester - evaluation
 - Mid-year - refresh, revitalize, & refocus
 - Prior to a conflict
 - At a time with no other major events/ schedule conflicts
 - Before new officer installation

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- Before/after a major program
- How long should the retreat last?
 - Depends on the level of engagement and depth of programming
 - Several hours – individual program focused, or budget planning review
 - Half day – organizational goal setting, officer transition, team training
 - All day – semester goal setting, officer training and engagement, team dynamics
 - Weekend long – yearlong goal setting, team dynamics, program workshops, presentations
- **Where – Where will your retreat be located and how will you get there?**
 - Choosing an ideal location can be a challenge. Staying away from everyday places can create an environment where members are encouraged to think outside of the box and be creative. Alternatively, the convenience and potential low-cost of familiar spaces may fit your organization's needs.
 - Consider the following:
 - Availability
 - Accessibility
 - Accommodations, esp. if staying overnight
 - Costs
 - Contracts
 - Check with your advisor, is possible, to see if they have suggestions
 - On campus
 - conference rooms, union, rec center, outdoor space
 - Off campus
 - organization facility, hotels or other lodging, experiential activity sites (ropes course, etc...), camps or retreat centers, state & local parks
 - Out of town
 - **Transportation**
 - Carpooling or rental vehicles are potential options, depending on the location of the retreat and the size of the group. Check with your advisor to see if he or she has recommendations for transportation. For example, DSOs may consider using K-State Motorpool.
- **What – What format and agenda will work best for the retreat?**
 - When designing your agenda think of your organization and its reasons for holding a retreat. Remember you and your members' responses to these questions:
 - What do we hope to achieve during the retreat?
 - What organization goals or business needs to be accomplished?

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- What interpersonal goals or teamwork needs should be addressed?
- It's a good idea to do a little of all the above. Combine organization work, downtime, and fun activities for the group.
- Plan to be flexible. Your agenda does not need to be written in stone. If the group is engaged in a productive brainstorming session, you may not want to interrupt their flow. Create a schedule that allows agenda items to be moved around depending on the group's needs.
- What is the best format for your retreat? Multiple formats are available to help you plan your agenda.
 - Members taking ownership – many goals can be accomplished when members take ownership of planning and facilitating their organization's retreat. People support what they help to create. A great way to give members ownership during a retreat is to ask them to participate in committees.
 - You can also arrange workshops to be presented by an "expert", such as your advisor, faculty members, or Division of Student Life staff.
 - If you are at camp-type facilities, there may be experiential exercises facilitated by camp staff, like team building, brainstorming, communications skills, rope courses, etc.
 - Downtime activities are important to include as well, such as recreational exercises, skiing, hiking, canoeing, biking, etc.
- Supplies, Materials, & Handouts - Whatever you plan, don't forget to outline all of the materials and supplies that you will need
 - What you want your venue to provide (power outlets, projectors, screens, internet access, etc...)
 - What you want your caterers to provide (plates, napkins, utensils, cups, straws, etc...)
 - What your facilitators need you to provide (laptops, paper, pens, notebooks, scissors, etc...)
 - What your participants need to bring (laptop, notebook, water bottle, snacks, bedding, towels, toiletries, change of clothes, specific footwear, bug spray, sunscreen, etc...)
- **After – How will you evaluate your retreat when it is over?**
 - Evaluation will help your organization continue to improve your retreats.
 - Design an evaluation for members of your organization to solicit their feedback on the retreat.
 - Ask facilitators to provide feedback as well.

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Planning a Retreat To-Do list

- Define Purpose & Set Goals**
 - Solicit input from key constituents (members, officers, leaders, advisors)
 - Consolidate feedback into written goals & objectives
- Form planning team & committees**
 - Ask for volunteers or delegate responsibility to members
 - Outline & communicate responsibilities for each team member or committee
- Develop a budget**
 - Determine how much of your organization funds you can spend on the retreat
 - Identify what retreat costs will be covered by the organization and what must be covered by individual participants
 - Consider any costs associated with presenters (travel, supplies, meals, thank-you gift)
 - Notify participants of any costs they may be required to cover
- Invite Participants**
 - Create participant list
 - All members, senior leadership, advisor, alumni
 - Collect any needed contact information
- Confirm external presenters**
 - Identify & contact any external presenters, such as Alumni, Faculty, Student Life staff
 - Confirm presenters date, time, location, travel, lodging, & supply needs
- Set the Date, Time & Location**
 - Determine ideal timeline for the retreat
 - Time of Year
 - Length (half day, full day, overnight)
 - Check availability of retreat participants (members, advisor, alumni, etc...)
 - Check availability of presenters
 - Check availability of location venue
 - Send a save the date to members & presenters
 - Confirm location reservation & maintain a copy for records
- Determine transportation needs & methods**
 - Confirm transportation reservation & maintain a copy for records
- Plan meals, snacks, and refreshments**
 - Solicit dietary restrictions from participants & presenters
 - Check with location venue for catering restrictions & preferred vendors
 - Schedule and confirm catering orders & maintain a copy for records
 - Create a shopping list of foods to be purchased with organization funds

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- Purchase foods provided by organization
- Create a packing list of food to be provided by participants, including snacks
- Create a packing list of all needed cooking utensils, pots, pans, plates, etc...
- ☐ **Create Retreat Info Packet for all participants**
 - Date, Time, Location
 - Transportation information
 - Location directions
 - Lodging specific
 - Packing list – bedding, shower supplies, snacks, laptop, etc...
 - Send info to participants as soon as possible
- ☐ **Set Agenda for the retreat**
 - Meeting time, room locations session times, breaks, downtime, teambuilders, breakout meetings, guest speakers, meal times, bathroom breaks, etc...
- ☐ **Confirm everything one week in advance**
 - All location & lodging reservations, presenters, vendors, caterers, attendees, etc...
- ☐ **Have a great retreat!**
 - Handout / mention evaluation procedure at the retreat
 - Evaluate feedback & plan again for an even better retreat next year!

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Resources

- <https://studentaffairs.psu.edu/involvement-student-life/student-organizations/training-development/student-organization-3>
- <https://www.winthrop.edu/uploadedFiles/clubsorgs/leadership/Retreat-Buliding.pdf>
- <https://www.sac.iastate.edu/leadership-service-center/leadership-and-service-center-outreach/leadership-and-service-center-resources/retreat-planning>
- https://activities.osu.edu/posts/documents/doc_11282016_15454339.pdf
- <https://housing.illinois.edu/Resources/Get-Involved/student-org-resources/planning-retreat>