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The Murray Grove Retreat and Conference Center

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ENTER

Dear Friends,

Welcome to the Retreat Planning Toolkit portion of the Murray Grove website. We hope that you will find this site a helpful resource for guiding you through an intentional and thorough retreat planning process.

Shortly after I arrived at Murray Grove some years ago, I was greeted one Friday evening by a young woman and her curly headed three year old daughter who had just arrived to attend their congregation's retreat. Since they were new to the congregation, members had encouraged them to attend the retreat so that they could get to know people better. The problem was they were the only ones here! They remained alone for two hours until a few others showed up. It really broke my heart and highlighted the need for a thorough planning process that attracts people and sends them away energized and inspired and not disappointed or discouraged. We can always tell the well-planned retreat by the way people's faces look when they are leaving. As it was, this woman took the bull by the horns and now organizes the most successful congregational retreat that is held at Murray Grove. Would you have reacted that way? She is definitely a saint in my book.

We UUs often say we don't have enough time: so listen up! It has been proven over and over that effective retreat planning and the retreats themselves save you time in the long run. If you place your focused energy on the planning of the retreat, then the retreat will practically run itself. Now, isn't that a concept!

Remember, retreats are not meetings; they should not be thought of simply as an extra long meeting. This is not their function. Rather,



We would really like to know what difference the Retreat Planning Toolkit has made to you, as well as your suggestions for improvement. Please email us at murraygrove@earthlink.net and put "Toolkit" in the subject line. Thanks!

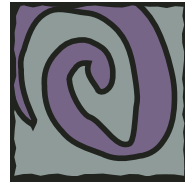
retreats are experiences that strengthen relationships and systems and allow groups and individuals to make their dreams for the future into realities. They are meant to focus on issues that are meaningful to you and your congregation whether these issues are content or organizational in nature.

Perhaps most importantly, retreats allow groups and individuals to spend more time together, to get to know one another and remind ourselves how the work we do for our congregation or community fits into the larger whole of our work and faith as Unitarian Universalists.

So, let's get started!

With great hopes for your success,

Ellen J. Chulak



At the heart of any successful Unitarian Universalist retreat is the building of...

firm relationships and **enduring** connections

effective groups

healthy congregational communities

working toward a **vital** Unitarian Universalist denomination.

RETREAT:

"A PERIOD OF SECLUSION, ESPECIALLY ONE DEVOTED TO RELIGIOUS CONTEMPLATION [OR WORK] AWAY FROM THE PRESSURES OF ORDINARY LIFE"

Webster's Dictionary



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Why to hold a retreat:

- To get to know one another better.
- To have a good time together.
- To build firmer relationships and enduring connections.
- To create more effective groups.
- To produce a healthy congregational community.
- To contribute to the vitality of our Unitarian Universalist denomination.
- To go more deeply into specific issues.
- To generate the powerful synergy that results from group thinking.
- To build a foundation that will bring about change.
- To plan aspects of your work together that can be used for an extended period of time.
- To allow individual members to change their perception of their role in the group.
- To create an inclusive vision, a sense of direction and a plan to effect strategic decision-making.
- To address issues the group leader cannot deal with on her/his own.
- To give individual members an opportunity to be heard.
- To focus directly on issues of conflict or trust.

Why *not* to hold a retreat:

- If your group is not committed to integrating the results of the retreat into the day-to-day life of your group work and your congregation.
- If certain group members have a hidden agenda or some position that they want to promote.
- If your group doesn't want to really listen to and get input from every member.
- If your group plans to set the vision or mission on behalf of your congregation: that is the congregation's work.

Though many individuals complain that they do not have time for retreats, it is clear that careful retreat planning can and will save your group significant time in the long-run. What gets accomplished at a successful retreat will impact the quality of your work as a group and hence your congregation or group. A well-organized retreat planning process creates a structure that will enable your retreat to run itself. That means that you, the retreat planner(s), can become full participant(s) in the activities of this distinct block of time. At the end of your retreat, your group will be able to look concretely at what was accomplished with satisfaction and clarity, both on a personal and group level.

The next question is...

Which statement relates most to your group?



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Which statement relates most to your group?

Select one:

- We are clear about what we want to accomplish at our retreat.

Begin the retreat planning process with:

[Step Two: Agreeing on who should attend the retreat](#)

- We are not clear about what we want to accomplish at our retreat and we do not have a facilitator to run us through a retreat planning process.

Begin the retreat planning process with:

[Information for the Organizer of the Retreat Planning Meeting](#)

- We would like to pick and choose retreat planning topics.

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Before the Planning Meeting

Information for the Organizer of the Retreat Planning Meeting

- Begin the planning process as early as possible, ideally 8-12 months before your retreat occurs.
- Decide method(s) for inviting people to the planning meeting (e.g., newsletters, flyers, phone, phone calls, email, announcements at church, etc.)
- Invite as many potential retreat participants as possible to the planning meeting.
- Consider what additional people beyond the possible participants it would be helpful to have at the meeting (e.g., minister, DRE/MRE, district staff, logistics coordinator, board chair, scribe, etc.)
- Arrange adequate time for a thoughtful planning meeting process (1-2 hours is recommended). It will be worth it in the end!
- Book appropriate space for your meeting early.
- Communicate directly about the meeting's purpose. **Be clear that this retreat planning meeting is not intended to solve problems or address issues.** It is a planning process.
- Decide who will facilitate the planning meeting.
- Determine if the meeting facilitator needs a scribe to record group responses on a flip chart. If so, who?
- Make sure that the facilitator has the equipment and supplies they need to do the job (e.g., flip chart, markers, masking tape, index cards, etc.)
- Decide how you will confirm meeting attendance.

[Review "Tips for Groups Using an Inside Facilitator."](#)

Goals for the planning meeting

- Setting priorities for the retreat**
- Agreeing on who should attend the retreat**
- Determining the budget**
- Settling on possible dates and length**
- Securing commitment from participants to attend**
- Articulating agreement for those not attending**
- Deciding if an outside facilitator is needed**
- Assigning roles and responsibilities for making the retreat happen**

Next:

[At the Planning Meeting](#)

[Step One: Setting priorities for the retreat](#)



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Step One: Setting priorities for the retreat

Determine what the group will achieve by the end of their time together at their retreat. What is it that you want to be different when the retreat is over?



ALTERNATE STEP ONE

1. **Record** responses to the following questions on a flipchart:

- Are the members of your group in agreement about its role or purpose as a committee, board, task force or other group? Does it need clarification and/or agreement?
- Are they aware of the historical context of the group? If not, do they want more education?
- Since the group may know one another, but not in this particular capacity, do they need to do some team-building?
- What precepts (by-laws, job descriptions, committee charge, governing documents, etc.) are in place about the group? Do documents exist that address the work of the group? If so, what are they? Is education needed?
- Do they know what your congregation's mission and vision is?
- Does the group's work relate directly to the fulfillment of a future vision held by the congregation?
- Do they have pre-existing criteria such as a strategic plan to base their work on? If yes, do they need to learn more about how the group relates to the plan?

- Are they achieving the goals and objectives stated in the plan? If they do not have a plan, do they need to create one?
 - If they have been given a "charge" as a committee by the board or the congregation, what information do they need to inform their retreat work?
 - What other questions do they need to address to do their job well?
 - What else is important to them as individuals that will make the retreat successful? For example: are certain geographical locations more convenient than others are? How far are we willing to travel? What will make the retreat experience personally gratifying: food, free time, getting the work done, outdoor activities, other?
2. **Synthesize group responses:** After answering these questions and others that arise, take a break and have one or two people coalesce your group's responses into major categories, covering all the issues. Write these categories and responses on the flipchart and present them to the group. Ask the group if they agree that all key concerns are covered under one of the major categories. Make sure to add anything that is missing.

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Step One: Setting priorities for the retreat (cont'd)

- Vote** for the top three retreat priorities: To keep it simple, ask each group member to review the flipchart and record their top three priorities on a note card. Have them hand the index card to the facilitator or scribe to record on the flipchart. Determine the top three priorities.

- Create** a brief written statement articulating what the group wants to have accomplished by the end of the retreat (organizationally and personally) in accordance with the top three priorities.

If one of your goals is to develop a Strategic Plan, click here: [What is a Strategic Plan?](#)

Congratulations!

Setting your retreat goals is the most difficult and important part of the process!



"COME DREAM A DREAM WITH ME,
THAT I MIGHT KNOW YOUR MIND..."

Hymn #346 from Singing the Living Tradition

[At the Planning Meeting, Step Two: Agreeing on who should attend the retreat](#)



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At the Planning Meeting: Alternate Step One

Setting Board Retreat Goals through an Evaluation Process

This is an alternate process for boards to use to set retreat priorities through the use of a thorough board evaluation tool. This tool examines how your board and your congregation are doing in relation to the goals you set for yourselves. Your board may need 2-3 hours to complete this process.

Information for the facilitator of the process.

First – Review the Facilitator information here:

[Tips for Groups Using an Inside Facilitator](#)

Second – You will need: [Copies of Handouts](#) and index cards for each board member, a flip chart, markers, masking tape and full board participation.

Third – Review the *Responsibilities of a UU Congregation Board* on [Board Handout #1](#) with your board. Make sure that the board agrees in general with these primary responsibilities. If they do not, please adapt and/or add to the list as a group before proceeding to the fourth step. Avoid detail but rather, aim for general agreement.

Fourth – Using the **Responsibilities** of a UU Congregation Board on [Board Handout #1](#) and any changes or additions you have made, ask your board to answer the questions on [Board Handout #2](#). Each responsibility is followed by suggested questions for use in retreat planning. Assign someone to record the final group answers on a flip chart to use later in setting retreat priorities.

***Note:** This discussion should avoid trying to solve problems that arise to solve problems, but rather to determine what issues need to be looked at in more depth at the retreat. These questions are designed to provide a quick overview that will highlight priority issues. Make sure that major issues are not left out. Take 5 minutes for each of the 10 responsibilities.*

Fifth – **Vote** for the top three retreat priorities: To keep it simple, ask each group member to review the flipchart and record their top three priorities on a note card. Have them hand the index card to the facilitator or scribe to record on the flip chart. Determine the top three priorities.

Sixth – **Create** a brief written statement articulating what the group wants to have accomplished by the end of the retreat (organizationally and personally) in accordance with the top three priorities.

Now move on to:

[At the Planning Meeting, Step Two: Agreeing on who should attend the retreat](#)



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Step Two: Agreeing on who should attend the retreat

With retreat goals established, it is important to determine who, in addition to group members, should attend the retreat. For example, do you want a speaker(s), your minister, your religious education staff, district/UUA staff, other congregational leaders, specialists, musicians, etc.? Make a list of those people.

The number of attendees often impacts retreat objectives. Decision-making is facilitated better with fewer people although idea generation flows better with a larger group. Likewise, skill-building sessions require adequate space for practice and partnerships or small groups.

For example, although this may not always be possible, the common meeting literature recommends:

- For decision-making, a maximum of 15.
- For think tanks, a maximum of 30, unless attendees are broken into smaller groups.
- For skill building, a maximum of 20.

Make a list of the group's "ideal" retreat participants (e.g., groups of people, names or titles) on a flipchart and have the group agree upon a participant list.

At the Planning Meeting, Step Three: Determining the budget



The Top 10 Common Group Problems

1. Floundering
2. Overbearing participants
3. Dominating participants
4. Reluctant participants
5. Unquestioned acceptance of opinion as fact
6. Rush to accomplishment
7. Attribution motives to people when we disagree or don't understand
8. Individuals feeling discounted
9. Digression., following tangents
10. Feuding team members



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Step Three: Determining the budget

Does your group know if there is a line-item in your congregation's budget for this retreat? If so, how much? If not, how much are participants willing to spend out of their own pockets and/or what channels do they need to follow to get approval for retreat expenses from the congregation?

Hidden retreat expenses often arise, so plan carefully. Some items to include in your budget are:

FACILITATOR:

fee for planning time and facilitation	\$	_____
transportation	\$	_____
food and lodging	\$	_____
other	\$	_____

FACILITY:

facility rental cost	\$	_____
equipment fees	\$	_____
services	\$	_____
meeting rooms	\$	_____
other	\$	_____

FOOD:

meals	\$	_____
appetizers/snacks	\$	_____
drinks	\$	_____
other	\$	_____

TRANSPORTATION:

travel reimbursement for attendees	\$	_____
site visits prior to the retreat	\$	_____
other	\$	_____

SUPPLIES:

flipchart paper	\$	_____
markers	\$	_____
tape	\$	_____
copying	\$	_____
videos	\$	_____
other	\$	_____

COMMUNICATION:

postage	\$	_____
paper	\$	_____
copies	\$	_____
phone calls	\$	_____

MISCELLANEOUS:

gifts	\$	_____
awards	\$	_____
flowers	\$	_____
aesthetics	\$	_____
other	\$	_____

TOTAL

\$ _____

[At the Planning Meeting, Step Four: Settling on possible dates and length](#)



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Step Four: Settling on possible dates and length

Ask the group to determine the length of their retreat by considering:

- Available funding
- Complexity of retreat goals
- Availability of leaders, speakers and facilitators

Agree upon several possible retreat dates and sites with participants. Keep in mind national and local holidays, events, and weather conditions. Ideally retreat dates will be scheduled well in advance (6 months to one year) so that invitees have adequate notice. Strive for 100% attendance.

Overnight retreats offer many benefits. They allow time for meaningful social and personal interaction within a different setting. They provide more concentrated time to delve into subjects at hand. What some consider to be an ideal retreat length (two nights and days; for example, Friday evening through Sunday afternoon) may not be possible due to scheduling conflicts. One overnight, at a minimum, is recommended.

Ask the group:

- **How long are they willing to spend at the retreat?**
- **Is this adequate time to achieve their goals?**
- **Are their retreat goals too ambitious? Do the goals need to be adjusted?**
- **What start and ending times work best for most? (Stressing the importance of beginning and ending on time.)**

For those working with outside facilitators, determine the facilitator's availability before confirming dates with retreat attendees. Late planning makes it harder to coordinate schedules and site availability. Communicate the final dates and times to participants at least 3-6 times before the retreat.

[At the Planning Meeting, Step Five: Securing commitment from participants to attend](#)



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Step Five: Securing commitment from participants to attend

These days people do not have any time to waste. Securing verbal commitments from individuals at the planning meeting that they will attend the retreat is extremely important. It is important for people to know that they are needed in order for the group to have a complete experience. And, although difficult at times, try not to make it easy for group members to renege on their commitment.

At the Planning Meeting, Step Six:
Articulating agreement for those not attending



UNTIL ONE IS COMMITTED
THERE IS HESITANCY, THE CHANCE
TO DRAW BACK,
ALWAYS INEFFECTIVENESS.
CONCERNING ALL ACTS OF
INITIATIVE (AND CREATION),
THERE IS ONE ELEMENTARY
TRUTH,
THE IGNORANCE OF WHICH KILLS
COUNTLESS IDEAS
AND SPLENDID PLANS:
THAT THE MOMENT ONE
DEFINITELY COMMITS ONESELF,
THEN PROVIDENCE MOVES TOO...

W.H. Murray



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Step Six: Articulating agreement for those not attending

It is hard to recreate conversations and relationships that are built between participants during a retreat. When members of your group cannot attend, they must agree to accept retreat outcomes. Ask your group to agree to this statement:

“Group members who do not attend the retreat will accept retreat outcomes.”

Make sure those who do not attend the retreat receive a copy of the minutes of the meeting with the outcomes highlighted.

[At the Planning Meeting, Step Seven:
Deciding if an outside facilitator is needed](#)



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Step Seven: Deciding if an outside facilitator is needed

Your group must determine whether an internal or external facilitator is best suited to manage the retreat process. A facilitator is always recommended. Keep in mind, a facilitator cannot manage the process and engage in discussions as a participant at the same time. While a person from within an organization may facilitate a retreat, it is recommended that that person have no direct or vested interest in meeting outcomes.

An effective facilitator can make an extraordinary difference to the outcome of a retreat. Experienced facilitators are particularly useful in offsetting common challenges of group gatherings such as lack of focus or clarity about roles and responsibilities, confused expectations and objectives, communication problems, problem avoidance, power or personality conflicts, participation imbalance, hidden agendas, data overload, negativity or redundancy. S/he can do much to maintain the flow of events and the group's positive energy using, at times, problem-solving tools such as brainstorming; rank ordering, asking participants to state issues in question form, identifying advantages-disadvantages or best-worst scenarios, discussing what others have done, asking "what I like about", using diagrams and so on. But most importantly, a good facilitator is an expert in active listening who remains neutral at all times.

Ask your group:

- **Does the budget allow for a facilitator? If so, how much?**
- **Based on retreat goals, do they need and/or want a facilitator to help them achieve their goals?**
- **What skills does that person need?**

Next:

[Criteria to consider when selecting an internal or external facilitator](#)

[Tips for facilitating if you are managing your own process](#)

[At the Planning Meeting, Step Eight: Assigning roles and responsibilities for making the retreat happen](#)



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Criteria to consider when selecting an internal or external facilitator might include:



CHOOSE THE FACILITATOR CAREFULLY; A BAD ONE IS WORSE THAN NONE.

Neutrality: can the person be neutral about the outcome of discussions? Can the person guide the process rather than control it?

Active Listening: does the person listen well and have the ability to suspend judgment, and understand multiple perspectives?

Adaptability: is the person able to take in feedback about the process and change the agenda accordingly to better meet the group's needs?

Problem-solving: does the person have the skills and stamina to help group members work through troublesome issues?

Maintaining an interactive flow: is the person able to encourage reticent participants to speak up and to help the group constructively manage behavior that interferes with the process?

Sensitivity to diversity: is the person comfortable in managing differences that stem from diversity?

Ability to help participants develop a structure for implementation of an action plan: Does this person have the skills to outline an action plan with action items and timelines for the work needed to be done following the retreat?

Ability to analyze and to summarize key issues: Is the person able to succinctly summarize key points at regular intervals throughout the retreat?

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Criteria to consider when selecting an internal or external facilitator (cont'd)

Professional Facilitative Behaviors include:

- Building an agenda in advance.
- Checking for agenda additions or revisions at the start of the meeting.
- Establishing ground-rules, such as respecting the input of every participant.
- Creating a safe environment.
- Clarifying and defining roles.
- Keeping the agenda moving within the timeframe.
- Keeping the group focused.
- Summarizing and clarifying.
- Getting agreement on process.
- Getting agreement on content and outcome.
- Staying neutral.
- Being positive.
- Suggesting a process for the work sessions.
- Educating the group about process.
- Encouraging the group to take responsibility for its actions.
- Being flexible and accommodating to the needs of the group.
- Remaining aware of the group's pace, mood and energy levels and altering the agenda accordingly.
- Dealing gently but firmly with behavior that impedes group process.
- Encouraging the more silent participants to talk.

Once a facilitator is selected, the agenda developer should communicate clearly and regularly with him/her to ensure an understanding of the group's history and goals as well as come to agreement about approach, agenda, outcomes, and follow-up.

[Tips for facilitating if you are managing your own process](#)

[Back to Agenda Developer page](#)



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Step Eight: Assigning roles and responsibilities for making the retreat happen

The planning meeting is designed to hear from as many of the potential retreat participants as possible. However, roles will need to be assigned during the planning meeting and, while there are no guarantees that people who have agreed to help plan the details of the retreat can participate in every planning session, it is important to make clear that those who take on specific roles have serious intent to follow through. The impact of losing planners mid-stream should be discussed with every planning team member so that each member understands his or her role and what their absence will mean to the process.

There are a number of roles that can be taken on by as many people as desired. However, it is critical that there is a Retreat Planning Coordinator who oversees every aspect of the retreat planning process. The following are the roles and responsibilities of planning team members required to ensure that a proper foundation is established for the retreat.

Roles Before the Retreat

Retreat Planning Coordinator – responsible for successful completion of all aspects of retreat planning.

Agenda Developer – coordinates all content aspects of the retreat and sets the retreat agenda. If the group has decided to go with an outside facilitator, the Agenda Developer will be responsible for selecting the facilitator.

Site Coordinator – investigates, selects and negotiates with representatives of the retreat site.

Communications Coordinator – creates and distributes all

communications between the planning team and the retreat participants in advance of the retreat.

Registrar – keeps updated registrations records and collects and disburses funds.

Retreat Evaluator – designs, disseminates and synthesizes a retreat evaluation process.

Roles At the Retreat

Greeter – welcomes and orients participants as they arrive and familiarizes them with the retreat site.

Recorder – takes minutes summarizing the group's thoughts and responses during the process of the retreat activities, keeps a record of the results and ensures that the minutes are sent to all participants and other appropriate parties.

Timekeeper – keeps group members and facilitator reminded of various time frames.



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At the Planning Meeting

Reviewing the Retreat Planning Meeting

- Do you have a written statement of the retreat goals?
- Do you have a list of those who will be attending the retreat?
- Do you have a budget?
- Do you have possible dates and times?
- Do you have a commitment from participants to attend the entire retreat?
- Do you have agreement from those not attending that they will accept retreat outcomes?
- Do you need an outside facilitator?
- Have you assigned all roles and responsibilities to members of the planning committee?



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Role

Retreat Planning Coordinator: is responsible for successful completion of all aspects of retreat planning. The coordinator keeps team members invested by establishing clarity about what is expected in regard to roles, responsibilities and timelines and to acknowledge and appreciate work well done. Maintaining a good team spirit, joint problem-solving, and frequent contact with team members also helps to keep people involved in the process.



"GRIEVE NOT YOUR HEART FOR WANT OF PLACE, NOR YEARN FOR EASY PRAISE, BUT FIT YOURSELF SOME TASK TO DO AND WELL EMPLOY YOUR DAY."

Confucius

It is useful for the planning coordinator to clarify in advance the expectation that, should a committee member need to drop out, they find a replacement and train the newcomer to assume their responsibilities.

The planning coordinator is also responsible for being a good facilitator during meetings (whether by phone or in person), taking into account different skills, abilities, and learning styles. With good listening and interactive skills, the coordinator encourages more reticent members to participate and overly talkative members to let others speak.

[Sample Timeline and Checklist](#)

[At the Planning Meeting, Step Eight: Assigning Roles and Responsibilities](#)



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Between The Planning Meeting And Before The Retreat

Sample Timeline and Checklist

8-12 months out

Role:

Retreat Planning Coordinator

- Organize retreat planning meeting
- Hold retreat planning meeting

Role:

Registrar

- Make and keeping updated a list of all retreat participants, including name, address, phone number, email address and emergency contact information for each person..
- Fine-tune the budget, with input from all other planning team members.
- Begin to collect funds from all applicable sources, such as congregational treasurer, participants, etc.
- Disburse funds as necessary, to pay for the retreat facility, meals, snacks, gifts, transportation, materials, etc.

Role:

Site Coordinator

- Investigate potential retreat sites and visit them, if at all possible.
- Select a facility, negotiate and sign facility contracts.

- Get all the information listed on the Sample Site Contact Sheet and Inspection Checklist.
- Give all pertinent information to the Communications Coordinator for dissemination to all participants

Role:

Agenda Developer

- Select facilitator, if necessary.
- Contact facilitator and agree on dates and times.
- Make sure that everyone on the retreat planning team knows the confirmed dates and times.
- Develop an agenda and/or refine and confirm speakers with the facilitator.
- Give completed agenda to the Communications Coordinator.

Role:

Retreat Communicator

- Inform all participants of retreat's purpose, date and location in writing via letter or email. Reinforce their commitment to attending.

4-8 months out

Role:

Communications Coordinator

- Remind participants of the retreat, including dates and times. Reinforce their commitment to attending.

3 months out

Role:

Site Coordinator

- Plan and arrange for local transportation needs: who will meet and greet and where.
- Arrange for parking at the retreat facility and, if long distance travel is involved, arrange for airport and train shuttles.

1-3 months out

Role:

Retreat Evaluator

- Design the evaluation form



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Between The Planning Meeting And Before The Retreat

Sample Timeline and Checklist (cont'd)

1 month out

Role:

Site Coordinator

- Determine meeting room set-up. Choose configurations appropriate to the activity and size of the retreat. A circle or u-shape without tables is recommended for retreats for easy eye contact and a more informal setting.
- Depending upon the size of the retreat, consider using signage to help the retreat run smoothly, such as welcome banners, directional signs, message boards, and meal signs.
- Send rooming list to retreat facility. If reservations are to be made directly with the retreat center, make sure correspondence goes out to participants clearly noting that they are responsible for making their own reservations and the date by which that must be done. Send a second reminder if time allows.
- Assign roommates, remembering that rooming people with those they may not know well helps to build community.
- Confirm attendee billing with the retreat facility.
- Finalize food and beverage requirements.

- Determine speakers' audio-visual needs.
- Finalize room and audio-visual setups.
- Obtain names, phone numbers and pager numbers of all key retreat staff.
- Purchase attendee and meeting materials, as needed, such as name badges, notepads, magic markers, masking tape and newsprint.

Two weeks out

Role:

Registrar

- Create a final master list of who signs up to attend the retreat, including emergency contact numbers for each person for use, if necessary, during the retreat.

Role:

Agenda Developer and/or Facilitator

- If applicable, ship materials to the facility. Label materials identically and confirm their receipt with the facility.

Role:

Communications Coordinator

- Send a packet to all participants and include:
- Dates of retreat

- Start and finish times
- Retreat agenda
- Name of and directions to retreat facility (include public transportation information if needed)
- An emergency contact number for family and friends
- A retreat brochure or flyer
- A list of what to expect at the facility and what to bring
- Written materials needed for the retreat, as requested by agenda developer and/or facilitator
- A note that participation is expected and appreciated

Role:

Site Coordinator

- Prepare name badges for all attendees.
- If applicable, ship materials to the facility. Label materials identically and confirm their receipt with the facility.
- Review the facility contract to make certain that all information is correct. Look for hidden costs. Confirm that the audio-visual equipment ordered is available.
- Confirm with facility the amount of final payment due and communicate to registrar



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RESOURCES

Between The Planning Meeting And Before The Retreat

Sample Timeline and Checklist (cont'd)

- Communicate final numbers and all last minute details to selected facility

Three days out

Role:

Site Coordinator

- Provide the retreat center with food and beverage guarantees. Guarantee about 10 to 15% under the anticipated attendance.
- Confirm the information about the meeting events to be posted on directional signs in the retreat center's lobby and hallways.
- Review the rooming list and confirm that all participants have pre-registered.
- Coordinate "meet and greet" activities and, if necessary, ground transportation for incoming travelers.

Role:

Agenda Developer

- Contact facilitator and/or speakers to ensure that their audio-visual and other requirements have not changed. Make any necessary adjustments.

Role:

Greeter

- Prepare greeting & orientation materials.

On site the day of the retreat:

It is important for the planning team, greeter and facilitator to arrive in advance to finalize arrangements with retreat center staff.

Role:

Site Coordinator and/or Facilitator

- Reconfirm all requirements.
- Check all meeting room set-ups.
- Check and test all AV equipment.
- Set up a registration desk, as needed.
- Review billing each day for accuracy.
- Review the "sleeping room pick up" — whether all rooms booked have been claimed by attendees. Find out, if the retreat center is sold out, whether it could help with any attrition costs.
- Inform the facility of all changes in the agenda.

Role:

Registrar

- Register upon arrival at the retreat site.
- Pay retreat center final amount due, if any.

Role:

Retreat Evaluator

- Pass out evaluations at the end of the retreat.

After the retreat

Role:

Retreat Evaluator

- Synthesizes responses.
- Communicate the responses to the group.

Role:

Recorder

- Send minutes to all participants and other appropriate parties.



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Role

Agenda Developer

If Using an Outside Facilitator, the agenda developer will be responsible for selecting the facilitator and helping to set the retreat agenda; making certain that it aligns with the expectations and priorities set out by the group. S/he is also responsible for agreeing with the facilitator (in writing) about dates, times and compensation.

An outside facilitator may want to stick to the specific content of the retreat and leave the rest of the agenda development to a person appointed by the retreat planning committee. A facilitator can sometimes help arrange for outside speakers. They can often secure outside participants, help you finalize the agenda and make sure that the entire process runs smoothly. If the group is self-facilitating then the same applies, however, the agenda developer will need to coordinate all content aspects of the retreat.

If Using an Inside Facilitator, the same applies. However, in that case the agenda developer will need to coordinate all content aspects of the retreat to the facilitator.

Tips for Groups Using an Inside Facilitator

As the agenda developer, it is important to help the facilitator, inside or outside, understand your group's priorities for the retreat and assist the facilitator as needed so that he/she can focus on the work that needs to be done rather than the surrounding details.



YOU POSSESS ONLY A SMALL LIGHT,
BUT UNCOVER IT,
LET IT SHINE,
USE IT IN ORDER TO BRING
MORE LIGHT AND UNDERSTANDING
INTO THE HEARTS AND MINDS
OF MEN [AND WOMEN].
GIVE THEM, NOT HELL, BUT
HOPE AND COURAGE.

John Murray, 1770

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When developing a retreat agenda, it is recommended that you plan to:

- Create an agenda that results in action that will bring about change.
- Determine what needs to happen for you to leave the retreat feeling successful.
- Ask the site coordinator if the retreat facility has an orientation and be sure to schedule that in.
- Make sure retreat results relate directly to what happens in the day-to-day life of your congregation and end in an action plan, including persons willing to be responsible for “Monday Morning Actions.”
- Start a retreat with an evening meal or a social event.
- Schedule “getting to know you” time.
- Create an opening and a closing segment or ceremony that grounds the group in the work they are doing - be intentional about it. Bring a chalice; create an altar; include flowers and/or other artwork. Have opening and closing words and other inspirational effects like music or movement to set the stage.
- Keep in mind that the atmosphere of your group’s space helps focus participants’ attention on what matters and reminds them to listen to their larger purpose.
- Have the agenda reflect respect for each and every person.
- Organize breakout sessions and informational presentations.
- Make breaks as long as possible — 20 to 30 minutes. This is where important connections can happen. Longer breaks after small group sessions let people follow up on discussions that arose during those sessions.
- Double the time originally planned for each session and, if necessary, cut back on agenda items.
- Allow enough time for questions. One rule of thumb is one minute of questions for each minute of presentation. Prepare discussion questions in case the group needs a kick-start.
- Allow adequate time for facilitator to answer questions or move discussions along.
- Allow time for participants to briefly state what they got out of the retreat.
- Allow 10 minutes for participants to fill out the evaluation form before ending.
- Gather evaluations before group disperses.
- List times on the final agenda. Experienced facilitators indicate that the maximum amount of time people can focus is about five to six hours.
- Pay attention to include any clean up or other “before and after the retreat” activities that need all or some of the participants to be involved.

The retreat’s length should be geared to its activity. Recommended timing guidelines include:

Brainstorming: 1 to 2 hours per topic

Progress reports: 15 minutes per speaker

Small group breakouts: 45 to 90 minutes depending on tasks and numbers

Breaks: 20 minutes for small groups; 30 minutes for large groups

[At the Planning Meeting, Step Eight: Assigning Roles and Responsibilities](#)



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RESOURCES

Role

Site Coordinator: Investigates, selects and negotiates with a representative of the retreat facility. This person will be the point person for all issues related to the facility. Communicates to facility staff any problems or issues that need addressing and ensures that regulations of the facility are adhered to by group members. For example: cleaning up after the retreat, stripping beds, etc.

Selecting a Retreat Facility

If your retreat needs to be held in a church

While many congregations hold retreats in their churches, this is not something we recommend. Holding a retreat in an unfamiliar setting is beneficial to groups because it allows for an escape from customary interruptions. A retreat setting enhances the opportunity for groups to relax and “think outside of the box.” If, due to financial or other reasons, it is necessary to hold a day-long retreat, try to have it in a church or facility other than your own.

Space Considerations:

Beyond the specific amenities that a retreat center has to offer are other considerations for site selection:

- Match the site to retreat goals. For example, if the agenda is more business than recreational, keep that in mind.
- A retreat calls for an informal and comfortable setting. A Unitarian Universalist retreat also emphasizes the importance of developing a “sacred space” that reflects the congregation’s religious orientation.

When exploring retreat facility options:

- See if there is a Unitarian Universalist retreat site near you. Their purpose is to serve you and they welcome the opportunity! [Unitarian Universalist Retreat and Conference Centers and Camps](#)
- Talk to your UUA district staff. They often facilitate meetings and retreats and may be familiar with a range of site possibilities. [Unitarian Universalist Association District Offices](#)
- Visit these meeting and facility planning links. [Other Meeting Facilities](#)

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Role

Site Coordinator (cont'd)

Check out possible sites:

- Try to secure a site and a date at least 8-12 months in advance, noting that for popular locations and times of the year, it may be necessary to select a site a year or more in advance.
- Have two or three options that allow you to compare prices. You may be able to use one facility's price quotes as leverage when negotiating with the facility you want.
- Negotiate complimentary use of special rooms. It's worth asking for what you need and seeing if the site will accommodate. If the person you negotiate with seems inflexible, see if there is someone else with whom you can brainstorm ideas.

Inspect potential sites, whenever possible:

- Develop a site checklist of necessary features and services tailored to your retreat needs and use it to evaluate facilities: [Sample Site Contact Sheet and Inspection Checklist](#)
- Whether or not a site coordinator is able to visit sites, it is useful to take notes and use the site inspection checklist when gathering information about sleeping accommodations, food (including special orders for people with restrictions), meeting rooms, business and recreational activities available, etc. Be sure to ask about

adjustable lighting, adequate soundproofing, handicap accessibility, etc. When possible, select meeting rooms with windows.

What to do once you have decided upon your facility:

- Develop a relationship with key facility staff from the first contact.
- Work out a timeline for decision-making about accommodations, meeting rooms, food and beverage needs, equipment and business center needs, etc. and integrate it into the Retreat Planning Checklist.
- Negotiate the facility contract. Make sure you understand the implications of the contract you sign. Inform facility staff of necessary changes to the contract as soon as possible.
- Determine what kind of advance deposit is needed and by when, and determine how it will be secured.

[At the Planning Meeting, Step Eight: Assigning Roles and Responsibilities](#)



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Role

Communications Coordinator: Creates and distributes all communication between the planning team and the retreat participants in advance of the retreat. Communicating clearly and often enhances your chances for success. Here are some suggestions to help you in this endeavor:

- Begin by gathering all pertinent information from the coordinator, agenda developer, facilitator, site coordinator, etc.
- Confirm the finalized date immediately with all retreat participants.
- Communicate the who, what, when, where and why of the retreat more than once (3-6 times is recommended).
- Publish announcements at the end of your minutes, in the church newsletter, via email, phone or postcard.
- Several weeks before the retreat, write a letter to all participants and include:
 - Dates of retreat.
 - Start and finish times.
 - Retreat Agenda.
 - Name and directions to retreat facility (include public transportation information if needed.)
 - A retreat brochure or a list of what to expect at the facility and what to bring.
 - Ask individuals about dietary or other restrictions.
 - Note that their participation is expected and appreciated.

[At the Planning Meeting, Step Eight:
Assigning Roles and Responsibilities](#)



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Role

Registrar: The registrar keeps updated registrations records and collects and disburses funds.

It is crucial to the success of your retreat to keep clear and comprehensive records, as well as to handle all the monies involved effectively.

- Make and keeping updated a list of all retreat participants, including name, address, phone number, email address and emergency contact information for each person
- Fine-tune the budget, with input from all other planning team members
- Begin to collect funds from all applicable sources, such as congregational treasurer, participants, etc.
- Disburse funds as necessary, to pay for the retreat facility, meals, snacks, gifts, transportation, materials, etc.

[At the Planning Meeting, Step Eight: Assigning Roles and Responsibilities](#)



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RESOURCES

Role

Retreat Evaluator: The retreat evaluator designs the evaluation form, disseminates it at the end of the retreat, synthesizes responses and communicates the responses to the group.

Retreat Evaluation

Evaluation is crucial for planning future retreats because it helps retreat planners assess what worked, what did not, how much was accomplished and how satisfying the process was. An evaluation form also gathers suggestions for improvement for future gatherings.

Evaluating the retreat

Use the written statement your group has created describing what they want to accomplish by the end of their retreat. Create an evaluation form tailored to your group's specific goals. Try not to ask questions that cannot be interpreted clearly. Hand it out, collecting completed forms before the end of the retreat, and communicate the results to participants following the retreat. Allow time for participants to fill out the evaluation forms before the end of the retreat; otherwise people tend to leave without completing them. (Ensure that this is on the retreat agenda.)

[Sample Retreat Evaluation Form](#)

[At the Planning Meeting, Step Eight: Assigning Roles and Responsibilities](#)



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At the Retreat Roles

At the beginning

Greeter: It is essential for someone to welcome and orient participants. Attending to group members is an extremely important task. It helps participants feel comfortable in the setting and warms up the group to begin the work. A familiar face upon arrival helps to relieve anxiety about finding one's way in unfamiliar surroundings.

Whether roommates are assigned or not, the greeter should have a map of the facility's layout and features, nametags, a list of rooms and a general sense of direction, registration lists, materials for distribution, etc. Offering formal or informal activities for those arriving early is also suggested. For example, consider hosting a social hour, initiate "get to know" you exercises, a walk or a game. Remember, there is always an underlying intention to build community. Pairing people in various ways who don't know each other helps this process.

During the work sessions

Often, assigning (and perhaps rotating) different roles among group members enables a more efficient group process. In essence, you are giving permission to a group member to pay attention to a specific aspect of the meeting, hence he/she can comment upon that particular aspect without seeming rude or intrusive.

Some of these roles and responsibilities may include:

Recorder: (This role may be combined with facilitator.) The recorder is neutral and creates group "memory," using key words and phrases of participants but not interpreting.

Timekeeper: The time keeper keeps group members and the facilitator reminded of various time frames. S/he can call time if a certain amount is allowed per person. For example: At group check-ins, lunch, breaks, etc.

All Retreat Participants, whose job it is to: arrive on time, be active participants, listen carefully and open-mindedly, contribute ideas, offer process suggestions.

[At the Planning Meeting, Step Eight: Assigning Roles and Responsibilities](#)



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RESOURCES

What is a strategic plan?

Retreats – and especially board retreats – often focus on strategic planning to ensure the health of the congregation. The following are some basic definitions and guidelines for undertaking this important activity.

Common definitions:

Strategy: A road map or course of action that guides an organization from where it is to where it wants to be within a certain period of time.

Strategic Plan: A plan with a progression of steps, designed to accomplish organizational goals over a defined period of time.

Mission Statement: A statement of purpose that clearly defines why your organization exists.

Goal: A broad, general statement of desired outcome that answers the questions of ‘where do we want to go?’ and ‘what do we want to accomplish?’

Objective: What, in measurable terms, your organization specifically plans to achieve by a particular date to realize a goal.

Tactics: Specific activities that enable objectives to be reached, e.g. who will do the task, by when, at what cost, etc.

Evaluation: A process of measuring what was planned against what was accomplished.

Successful strategic planning involves:

Determination of WHO should be involved; ensuring BUY-IN and ongoing INVESTMENT of participants.

Development of a MISSION STATEMENT that captures the organization’s values (what is important about what you do) as well as mandate (what you do).

ASSESSMENT of your current situation, internally (staff, board, etc.) and externally (relative to congregants; taking political, social, and economic climate into account).

Determination of desired CHANGES and accompanying TIME-FRAME needed to make those changes: A year? Three years? Five years?

Development of a STRATEGIC PLAN that includes realistic GOALS and OBJECTIVES that identifies:

- prioritizes manageable steps the board will take to meet goals.
- who will do the work and by when.

Development of an EVALUATION component that has measurable outcomes.

GATHERING FEEDBACK from participants and making improvements to the process.



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Unitarian Universalist Leadership Development Resources

Lay Leadership resources at:

<http://www.uua.org/programs/layleader/>

Check out the lay leader development section at [uua.org](http://www.uua.org). It will link you to leadership development resources based on your own specific criteria.

UUA Bookstore

<http://www.uua.org/bookstore/>

email: bookstore@uua.org

800-215-9076

Leadership Development Resources

Bookstore of the Alban Institute

The Alban Institute is an organization providing new research-based information and new ways to learn and minister more effectively within and outside a faith community.

<http://www.alban.org/bookstore.asp>

email: publications@alban.org

800-215-9076

General Resources

Facilities

Unitarian Universalist Retreat, Camp and Conference Sites:

Council of UU Camps and Conferences (CU2C2)

<http://members.aol.com/jlagerCU2/uucamps.htm>

Other Meeting Facilities

Meeting Industry Web Sites

<http://www.eventsource.com>

is a large, complete and very useful database of meeting facilities, strong in non-traditional values.

<http://www.plansoft.com>

is a comprehensive database of meeting facilities and other supports.

Facilitators

Unitarian Universalist District Contact Information

Your district office is an important resource for congregational retreat facilitation. Check with your UUA District staff to see what facilitator's are available to assist in meeting your retreat goals.

<http://www.uua.org/DIST/>

Books on Meeting and Retreat Planning

Campbell, Sheila and Merianne Liteman with Steve Sugar, *Retreats That Work: Designing and Conducting Effective Offsites for Groups and Organizations*.

Devney, Darcy, *Organizing Special Events and Conferences: A Practical Guide for Busy Volunteers and Staff*.

Weissingner, Suzanne, *A Guide to Successful Meeting Planning*.

Williams, Judy, *How to Plan and Book Meetings and Seminars*.



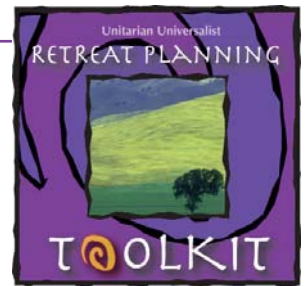
Setting retreat goals through a board evaluation process

Board Handout #1

As a board, do you agree, *in general*, that the following list represents your primary responsibilities as the governing body of your congregation? If not, please edit and/or add other responsibilities that are not included on the list.

1. **Determine** (with member input) the congregation's mission and purposes.
2. **Facilitate** the calling of a minister, if there is to be one, in accordance with the by-laws and search process.
3. **Support** the minister, if there is one, and work together to define ministry in concert with your Committee on Ministry.
4. **Ensure** effective organizational planning.
5. **Ensure** adequate resources (staff, volunteers and finances).
6. **Manage** resources effectively.
7. **Determine, Monitor and Strengthen** the congregation's programs and services.
8. **Enhance** the congregation's public standing.
9. **Enhance** legal and ethical integrity and maintain accountability.
10. **Recruit and Orient** new board members, in concert with the Nominating Committee, and assess the board.

(These 10 points are adapted from *Ten Basic Responsibilities of Nonprofit Boards*, National Center for Nonprofit Boards.)



Setting retreat goals through a board evaluation process

Board Handout #2

Please take five minutes per item to answer the questions below. **Please do not try to solve problems generated by the questions, simply try to identify issues that need attention.** Some of your answers will be: yes, no, or don't know.

1. **Determine** (with member input) the congregation's mission and purposes.
 - a. Do you have a mission statement?
 - b. If so, how old is it? How often is it reviewed or updated?
 - c. What does it say?
 - d. Can most congregants recite it from memory?
 - e. Does the mission statement inform the overall work of the congregation?
2. **Facilitate** the calling of a minister, if there is to be one, in accordance with the by-laws and search process.
 - a. If a ministerial vacancy currently exists, are plans well in hand for the upcoming search? Do you understand the process?
 - b. If a new minister has been called, are plans made for a start-up process?
3. **Support** the minister, if there is one, and work together to define ministry in concert with your Committee on Ministry.
 - a. What are your current provisions for a Committee on Ministry?
 - b. How effectively is it doing its work?
4. **Ensure** effective organizational planning.
 - a. Do you have a strategic plan?
 - b. How old is your current strategic plan?
 - c. If such exists, how is it kept updated? Are you always looking at least five years down the road?
 - d. If such exists, how effective is it in informing the overall work of the congregation?
5. **Ensure** adequate resources (staff, volunteers and finances).
 - a. Are there gaps in your overall staffing that keep you from doing the congregation's work?
 - b. How are volunteers managed?
 - c. Where do you stand in relation to the UUA Fair Compensation Guidelines?
 - d. Describe your annual canvass. Have you met your goals in recent years? How are such goals established? Are there other sources of revenue?



Board Handout #2 (continued)

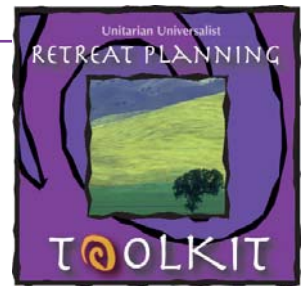
6. **Manage** resources effectively.
 - a. Are adequate procedures in place to manage the congregation's funds?
 - b. Are procedures in place to conduct an internal financial audit? (The price of an outside audit prohibits many congregations from engaging someone from the outside.)
 - c. Is the congregation financially secure?

7. **Determine, Monitor and Strengthen** the congregation's programs and services.
 - a. In general, is your committee structure working?
 - b. Are your committees empowered to do their work without the board's interference?
 - c. Are procedures in place to train lay leaders?
 - d. Is there a Council of Committees in place?
 - e. If so, how effective is it?
 - f. Is the board monitoring committees? How does the board rectify tough situations?

8. **Enhance** the congregation's public standing.
 - a. Does your relationship with the community need further development?

9. **Enhance** legal and ethical integrity and maintain accountability.
 - a. Are your by-laws up-to-date and relevant to the congregation's work?
 - b. Are the by-laws reviewed on a regular basis?
 - c. To what extent does the board work intentionally, keeping the congregation fully informed about its work?
 - d. Is the Committee on Ministry fully empowered to do the work of congregational/ministerial evaluation?

10. **Recruit and Orient** new board members, in concert with the nominating committee, and assess the board.
 - a. How well do you know each other?
 - b. Is there general understanding and agreement on how the board operates?
 - c. Are you able to articulate the governance structure of the board?
 - d. What is the board's responsibility to the congregation?
 - e. What do you understand about the board's relationship to the minister and staff?
 - f. How well understood are the current membership/attendance trends in the congregation?
 - g. Is there a process in place for dealing with congregational conflict?
 - h. Do you have an evaluation process for the board?



After the Retreat

Sample Retreat Evaluation Form

Our retreat goals are:

1. On a scale of 1 (least) – 5 (most), please rate the following:

- | | | | | | |
|---|---|---|---|---|---|
| a. The overall retreat experience | 1 | 2 | 3 | 4 | 5 |
| b. Did the retreat accomplish its stated goals? | 1 | 2 | 3 | 4 | 5 |
| c. How well did the retreat format/agenda work? | 1 | 2 | 3 | 4 | 5 |

What would you do differently? _____

2. What was the most gratifying aspect of the retreat experience? _____

3. What was the least gratifying aspect of the retreat experience? _____

4. Did you receive adequate support from:

- | | | |
|----------------------------|------------------------------|-----------------------------|
| a. The retreat planners? | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| b. Facilitator? | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| c. The other participants? | <input type="checkbox"/> yes | <input type="checkbox"/> no |

What kind of support was missing? _____

5. What recommendations do you have to improve your next retreat? _____

Please give suggestions about future areas of exploration and about educational/informational needs. _____

6. If invited, would you participate in another retreat of this type? Why or why not? _____

7. Are you clear about how the work of the retreat will be integrated into your congregational work? yes no

8. Other suggestions: _____

Name: _____ Date: _____



Sample Site Contact Sheet & Inspection Checklist

Date: _____ **Contact Person:** _____

Facility Name: _____

Address: _____

Mailing Address: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Retreat dates discussed: _____

General location: _____

Distance from congregation: _____

General description: _____

First Impressions

Lodge, driving into facility, other: _____

Contact person:

Friendly: yes no

Efficient: yes no

Other staff:

Friendly: yes no

Efficient: yes no

Total facility capacity: _____

Number of different groups typically present: _____

Number of rooms available: _____

Number of rooms reserved: _____

Handicap Accessible? yes no

Accessibility for special needs (describe): _____



Sample Site Contact Sheet and Inspection Checklist (continued)

Facilities

Lodge or other gathering areas (describe): _____

Amenities: _____

Worship Space (describe): _____

Meeting Rooms (describe):

Main room: _____

Break-out space: _____

Other: _____

Amenities: _____

Equipment and services

AV staff in-house	yes <input type="checkbox"/>	no <input type="checkbox"/>
VCR	yes <input type="checkbox"/>	no <input type="checkbox"/>
DVD	yes <input type="checkbox"/>	no <input type="checkbox"/>
Microphone	yes <input type="checkbox"/>	no <input type="checkbox"/>
Overhead projector	yes <input type="checkbox"/>	no <input type="checkbox"/>
Copying available	yes <input type="checkbox"/>	no <input type="checkbox"/>
Internet access available	yes <input type="checkbox"/>	no <input type="checkbox"/>
Computer services available	yes <input type="checkbox"/>	no <input type="checkbox"/>
Projection screen	yes <input type="checkbox"/>	no <input type="checkbox"/>



Sample Site Contact Sheet and Inspection Checklist (continued)

Guest Rooms (describe)

Bedrooms (beds, bureaus, desks, tables, chairs, etc.) _____

Does the facility require a room assignment list in advance? yes no

If so, how far in advance? _____

Bathrooms Private Semi-Private Shared

Handicap Accessible? yes no

Amenities _____

Facility Renovations (list all) - will anything else be going on while you are there? _____

Food and Beverages

Food service available yes no

Vegetarian options available? yes no

Vegan options available? yes no

Meal(s) sampled: breakfast lunch dinner

Quality: excellent good mediocre

Own cooking available yes no

Other food and beverages available throughout the day _____

Other food options _____

Pets allowed? yes no

Smoking allowed? yes no



Sample Site Contact Sheet and Inspection Checklist (continued)

Recreation

Recreational Opportunities On-Site _____

Recreational Opportunities Off-Site _____

Transportation

Airport transportation? yes no
Public transportation? yes no
Other _____

Rates

per person: _____
per room: _____
per building: _____

Cost of meeting space: _____
Cost of meals: _____
Meals include: _____
AV costs: _____
Other costs: _____
Total cost: _____

What deposit amount is expected? _____ By when? _____

Note: Review a typical contract, paying particular attention to cancellation and attrition clauses.

What other items did your retreat planning team want you to consider? _____

