

# THE CHRONICLE OF HIGHER EDUCATION

## There Is Such a Thing as a Good Retreat

**How to plan a faculty and staff retreat that people will actually find valuable**



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*By Rob Kramer* NOVEMBER 09, 2016

**E**arlier in the fall I wrote "[Death by Retreat](#)" about some of the worst campus retreats I've ever had the misfortune to organize or attend. Horror stories are always

more fun to share than happy ones, but the fact is, I have been a part of numerous retreats over the years that were useful and, dare I say, even inspiring. In a new book, *Management and Leadership Skills for Medical Faculty*, my coauthor and I even devoted an entire chapter to the process of designing and delivering effective retreats.

So in advocating retreats, are we evil? Gluttons for punishment? Neither. We have simply learned from experience that a well-planned retreat can be a useful experience for faculty and administrators. And its value often reflects whether management is attentive — or not.

It's not simply that "poor" leaders run poor retreats and "good" leaders run better ones. It's more about the retreat itself: Is it well-timed? Have organizers gathered comments on what people want to get out of the retreat? And was their input actually followed in the planning and execution of the event? A good retreat can produce proposals that people truly want to follow, decisions made for the betterment of a department, and time investments that actually matter to the people involved.

Here are a few of my "greatest hits" from nearly 20 years of designing and running academic retreats.

"Strategic planning" is not a dirty word. A division director at a prestigious university asked me to help her design a strategic-planning retreat for her staff. She was relatively new to both her role and her university, and saw the need for concrete goals and strategies to provide people with clear direction and priorities.

I know — already that language sounds jargony, corporate, and unpleasant to the academic ear. Please bear with me.

In talking with the director, I helped her recognize that some people might not respond well to the jargon of strategic planning, or to the actual process, as it is so dissimilar to how they are used to operating. Additionally, this was a large program (more than 40 people) of highly engaged, smart, and articulate professionals with lots of ideas.

That marks an important moment in designing a good retreat: It has to reflect what the leader hopes to accomplish as well as those who will attend (and how they think, act, and participate). Seeing a disparity between the two, I suggested we use a nontraditional process known as Open Space. That approach accomplishes two things: (1) It allows participants the freedom to choose which topics interest them, rather than forcing everyone to discuss the same thing at the same time, and (2) the process reveals what people care about most. If no one attends a particular topic discussion,

for example, that tells us how well people are likely to support that issue moving forward.

The retreat results were pointed, organized, and uniformly supported. A dozen goals were identified and easily prioritized. The breakout discussions generated a clear list of steps to be taken, and participants set timelines for accomplishing each. People were energized by the results, the director was delighted to have clear outcomes and timelines, and the division had a clear path of priorities moving forward.

Wait, this isn't just a retreat? The chair of a top academic department at a large university asked me to help guide the faculty through a curriculum redesign. Specifically, the chair wanted help organizing a faculty retreat to discuss the redesign.

It soon became clear, however, that this was going to be a complex debate, the scope of which was more than a single retreat could handle. Instead, we settled on a longer process to give the department's faculty members ample time to debate and prepare themselves for which changes they wanted to make. The process would take a full academic year of laying groundwork and having conversations — prepping everyone in advance of the retreat.

First, the chair convened a curriculum-redesign committee. The committee created reports on key issues such as peer institutions' curricula, alumni surveys, and a self-study. Concurrently, I led focus groups, hearing from all of the department's faculty members about what they believed was working and not working with the curriculum. We created and shared a "faculty insights" report summarizing those discussions. In addition, the committee and the chair regularly updated professors on the progress of the redesign and asked for their views throughout the year.

By the time we reached the actual retreat, the department had been thinking about, analyzing, and discussing possible curricular changes for seven to eight months. At the retreat itself, conversations moved productively, and those that veered off course were redirected. Because of all the advance groundwork, faculty were able to focus on the greater goal — to select a new curriculum model — instead of being distracted by any potential personal agendas or intellectual infighting. The retreat went smoothly. No grenades were detonated, and the department made solid decisions that influenced its curriculum redesign.

Mix it up. The last thing any faculty member wants is to attend an all-day retreat where it is basically a glorified, but painfully longer, faculty meeting. The same loud voices dominate the conversation and the same breakdowns occur over hot-button issues. A retreat will be more productive — and certainly more pleasant — if it offers a mix of activities, discussion groups, and ways of participating.

Recently I conducted a retreat for a faculty group that chose to meet at a beautiful off-site location with lots of lovely food and scenery.

Caution: Beautiful off-site locations are useful (1) if the group is given time to actually enjoy said location (not just sit in meeting rooms all day), and (2) if the retreat, once again, appears to be a valuable use of time. Otherwise, you've just made people commute further to work that day, which typically doesn't instill joy.

In this case, the faculty were attending the retreat by choice, as they were engaged in a larger process for which they had volunteered (I am being intentionally vague here to avoid outing the institution). However, some of the department's past retreats had yielded mixed results. It was important for this one to be a good experience for faculty members, or we would easily lose them.

It was also clear that this group was overworked and overwhelmed. Most retreats are designed for extroversion — lots of talking, lots of interacting, lots of expending energy. These people were coming to the retreat tired. So we agreed on a design that balanced time to think with time to interact. We gave them plenty of time to be outside, time alone, time in pairs, and time in small groups.

By the end of the day, we were tackling real issues and applying them to the challenges they were facing at work. So not only was the day "productive," but it was also replenishing and provided them time to solve some actual problems.

Retreats don't always have to be disastrous, painful, and avoided at all costs. In fact, if they are carefully planned and thoughtfully run, retreats can even be ... enjoyable. Luke Skywalker might say, "Noooo! That's impossible!" And yet, we now know Luke was wrong.

Good luck at your retreats this year.

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