

## ADVICE

# Death by Retreat

Three tactics you should definitely not pursue in organizing a staff retreat



By *Rob Kramer* SEPTEMBER 07, 2016

**F**ew words strike more intense malaise into the hearts of people across higher education than

"we are going to have a retreat."

Retreat. At first glance the word is not so threatening. To retreat. To back up? To slow down? Or, more likely: to run away from.

What is it about work-related retreats that puts so many people off? It wouldn't be because they take a lot of time away from the work that people would rather be getting done, and force them to gather in a dark room, eat conference-center food, and come away with little or no outcomes that will make a difference down the road? What makes for a good retreat, anyway?

Over the years I have organized, designed, and facilitated hundreds of retreats with thousands of faculty, staff, and administrators, in locations around the world. Many have been in dark conference rooms with poor lighting and equally poor food. I have also conducted retreats in beautiful locations: at a ski lodge in front of a roaring fire, and on a beach eating fresh seafood and drinking cocktails. And at both extremes I have witnessed — and unfortunately sometimes been a contributor to — events that left participants in a worse place than before.

So why do so many campuses continue to look to retreats as a mechanism for organizational improvement when they so often seem to create the opposite effect? Because sometimes they do work. It's when they don't that things can go terribly wrong. I have been at retreats where disastrous decisions turned a hesitant group into a hostile one. So, without further ado, here are a few of my greatest (worst?) hits — offered in hopes that you will avoid these tactics as you organize your next retreat.

Too much, too soon. An executive was six months into her tenure in an essential division of a major research university. After doing the usual "listening tour" (translation: attend all of the various teams' staff meetings, demonstrating care and concern for their issues and needs) and assessing what the executive believed was needed to "fix" an organization that was already high functioning, the executive called for an all-hands meeting to "forge the future, together." The executive, however, did not want to call this event a retreat, as that suggested looking backward. Rather, the event was to be called an "Advance!"

Imagine you work in a division or a department that you enjoy. Certainly it has its quirks, like any workplace, but for the most part, you and your colleagues are happy enough and believe in the work you do. The new senior administrator shows up, checks you all out, and then announces that changes need to be made and discussed at an "Advance!" This is a recipe for: (1) a long day, (2) unhappy people at the start, middle, and end of the day, and (3) not a great gig to get if you are asked to be the facilitator.

**Retreats are not 'edutainment.' They work best when every participant has a vested interest in what is being discussed and understands how the outcomes of the session will affect them and their work.**

As you might imagine, even with lots of groundwork laid in advance, the day was a disaster. People felt under attack and disgruntled. Plus they lost a day of productivity.

Lesson: Retreats go poorly when the reason for the retreat does not match the organization's true needs. Rather, this leader could have benefited by working with the team to identify topics of value for a retreat. Gaining buy-in early on would have helped the participants feel much more engaged in the process and the retreat. And, by the way, it is totally fine to call the event a retreat.

Behind the looking glass. My team was hired to work with the associate dean of a school that had a lot of serious trust issues. The staff had separated into fiefdoms, morale was low, and there had been frequent turnover with their administrative managers. The associate dean had hoped that the staff members could have a facilitated retreat, without management, to talk through their concerns and struggles, and develop a list of suggestions, changes, and improvements for themselves and the larger organization.

My team was hesitant to take on this project, given the volatility within the school. We approached the client with a plan that included interviews and assessments, with a strong focus on honoring confidentiality and anonymity. We wanted to protect staff members and help them feel comfortable speaking freely at the retreat.

The day arrived. The associate dean was there in the morning to give words of welcome before leaving us with the staff, as planned. But at the conclusion of her remarks, and quite by surprise to us all, she announced that she would be watching the session from an adjacent room behind a two-way mirror. We weren't even aware there was a two-way mirror or an attached room. Both had been hidden behind a curtain on our site visit and never pointed out to us.

That may be the official example of being left "holding the bag." The staff was shocked and horrified. We were in a similar state. We called a time out. One of our team members went to speak to the associate dean about her choice. The others stayed with the staff to check in with them on the unfolding situation.

The associate dean refused to leave. The staff got equally determined and insisted on continuing — with everyone fully aware that the associate dean was watching behind the mirror. The results? There were no results. The scheduled agenda was covered but nothing substantive was shared and, of course, trust issues were intensified.

Lesson: Retreats go poorly when the retreat convener has a hidden agenda.

Driven. To distraction. This time I was a participant when my department hired an external facilitator to guide our annual retreat. We were a group of about 40 faculty members, staff members, and administrators. Our annual retreat had various goals each year: team building, strategic planning, professional development.

Regardless of the point of any retreat, the quality of the facilitator matters. A good facilitator keeps the trains running on time, is efficient, effective, practical, and hopefully pleasant to interact with. A good facilitator understands that her/his role is to help the participants have a successful event.

Enter the Scarf Juggler.

This particular year, our facilitator was selected by a committee. She showed up wearing what I can only describe as flowing robes. Her sandals matched her endless array of jewelry, which seemed to dangle from every limb, orb, nook and cranny. She wore a headset microphone, much a like a pop star at a concert.

She told stories. Lots of stories. She took a bow whenever anyone applauded or laughed. And the *crème de la crème*: When discussing how people can learn, grow, and build skills if they only set their mind to it, she pulled out three long, brightly colored scarfs, and proceeded to show us how she could juggle them.

Instantly the room filled with a mix of gasps, nervous laughter, and amazement. We were no longer at a "retreat," we were at the circus.

Lesson: Retreats go poorly when the facilitators make it about them. Another way to handle this situation would be to: (1) Make it clear to the committee what type of retreat facilitators are needed, and (2) to adequately vet and prep the facilitators in advance so they know what you want — and don't want — from them.

And there is the conundrum. Do we have retreats to have fun? Do we spend the day together to get things done? What's the right formula for success?

In my experience, each group gathering for a retreat is different, and should be treated as such. Retreats are not "edutainment." They work best when every participant has a vested interest in what is being discussed and understands how the outcomes of the session will affect them and their work. As Shakespeare wrote: "A thousand hearts are great within my bosom: Advance our standards, set upon our foes."

Or, as you may be thinking: Oh jeez, can't I just go back to work?

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