

# Team Retreat Guidelines

June 2017

## Role of Team Retreats | Alignment with College Strategy

The SLT fully supports using Team Retreats to develop our employees, and values the results that Team Retreats provide to our students and the operations of our College.

The SLT's goal is for Team Retreats to focus on topics that specifically relate to:

- Student success
- Planning for the future of the team and setting priorities
- Setting the direction of the team
- Investigating innovative solutions to current circumstances
- Improving on customer services
- Building upon the strengths of the team
- Improving work processes

## Standard Retreat Topics

To support these focus areas, five standard Team Retreat topics have been approved by the SLT:

- Maximizing Team Strengths
- Customer Focus
- Change Readiness
- Organizational Wellness
- Strategic Planning and Goal Setting

Special requests for topics other than the standard topics must demonstrate a critical need that has a direct impact on students or affects college operations, and will be coordinated with the OTD team to determine the ability to deliver the requested topic and time required to develop a customized solution.

## Retreat Planning

Approval is required for Team Retreats by the respective SLT member. A leader should submit a Request for a Team Retreat through their leadership chain including their SLT member. After SLT approval, the leader should contact the Organizational and Talent Development (OTD) Team to plan the retreat. We recommend a lead time of *at least 6 weeks* prior to the retreat to ensure the availability of a facilitator. Leaders are responsible for coordinating the retreat facilities, food, materials, etc. In accordance with our commitment to fiscal responsibility, the SLT has implemented college-wide standards for Team Retreats.

## Facility Standards

The *default* expectation is that team retreats will be held at college facilities. Certain circumstances may be conducive to off-site retreats, and requests for off-site retreats require the approval of the respective SLT member. Once approved, the guidelines for off-site retreats are as follows:

- The team leader must state the business need for holding the team retreat off-site
- The justification that participants need to be away from work distractions will not typically be adequate justification for the request
- Access to technology (smart phones, tablets, laptop computers) typically negate any advantage of an off-site retreat
- Facilities rented for off-site retreats should be free or low cost. It is the responsibility of the leader to

locate these facilities

## Food and Refreshments

### Full Day

The target per person cost for a full-day retreat should be \$25 - \$30. This includes:

- A light breakfast (fruit and muffins/pastries), moderate lunch (sandwiches and salads), and beverages are typically \$20 per person.
- Afternoon snacks should not exceed \$5 - \$10 per person
- Assorted beverages should be available throughout the day, and included in calculating the per person cost

### Half Day

The target per person cost for a half-day retreat should be \$15 - \$20. Beverages should be provided throughout the day with a choice of one food option:

- Breakfast or
- Lunch or
- Mid-morning or mid-afternoon snack

## Supplies and Incidentals

Requirements for meeting supplies will vary depending on the purpose of the retreat and will be approved at the discretion of the respective leadership chain. Here are some cost containment ideas:

- Re-use items and décor
- Minimize use of color copying
- Use color copying for key handouts where color differentiation is necessary for understanding the materials
- Use black & white handouts
- Use no handouts. Send the presentation electronically to reduce costs for purchasing notebooks and folders, copying costs, and employee time to create manuals

## Proposals

A template is available to assist leaders in developing a proposal. At a minimum, the proposal will include:

- Reasons/issues
- Topics to be covered
- Expected outcomes
- Logistics

The SLT member may, at his/her discretion, request additional information.

## Leader Summary

Upon conclusion of the retreat, the leader is to provide a summary report (template available) to all leaders within the leadership chain including the SLT Member. At a minimum, the summary report will include:

- Outcomes achieved

- Expected positive impact on the team
- Next steps the leader and team will take to ensure ongoing progress

The SLT member may, at his/her discretion, request additional information.