

Board Retreat Manual



TEAMWORK



CKI

Circle K International

Made by Your Very Own LTGS

1. Introduction

It's hard to overemphasize how much good a board retreat can do. It's more than about training the board. It's about setting standards and expectations early, deciding on goals, and bonding the board well.

2. Location

One of the most important things to keep in mind while in the planning process of a board retreat is *where* you will have it. Location is key in putting together a successful and productive board retreat and makes a group outing that much more memorable and long lasting. One of the main purposes of a board retreat is to bond together as a cohesive unit, ensuring that every member of the board is on the same level.

If possible, have your retreat away from the day-to-day hassles of civilization: school, work, and other menial tasks. Get away from the usual comfort zones created by cell phones, Internet, or outside influences. You don't need to isolate yourself entirely from the world, but a large degree of isolation is a *must* in order for progress to be made.

Retreats can be held practically anywhere (the beach, local camps, on campus, hotels, etc.), but keep in mind the theme or the goal of the retreat when choosing a location. A day at the beach is disastrous for a "Getting down to Business" retreat but makes for an excellent day of bonding.

You should be able to tell yourself exactly why you chose a certain location, and how it adds to the overall retreat. Don't be afraid to put in the extra effort deciding where; it'll be well worth it.



3. Preparation

1. Set up at least a general timeline of events if not a full agenda. Make them realistic (include lag times with setting things up and travel).

2. Print out all materials: calendar of major events, CERF, ERF, MRF, expenses reimbursement forms, copy of board members and advisors contacts etc. Some people like to organize these materials in binders.

3. Send out a packing list for the members attending, so they know what to expect. Remind them of the little things like flashlights, or pen and paper to take notes.

4. Rehearse in your head how the retreat will pan out and make sure everything is covered.

5. Food! It gets its own section later.

4. Workshops

The amount and structures for workshops during the board retreat are based on each retreat itself. Listed are several topics that every board should know that aren't necessarily covered by district training events, and are more effective when addressed as a board. If any of the workshops need to be presented to you for your own benefit, swallow that pride and ask from a district board member or any previous club officers you trust. It's important to ask questions beforehand and then act like you know everything on the day of, than to try to fake it.

Setting the standard – This should be your first workshop. Tell them as soon as you can, or even if that opportunity's passed, remind them, what exactly you expect from them as board members, and what you want to get accomplished for the next year.

Brief overview of Circle K – Board members should be familiar with not only the basics of Circle K (infrastructure, DFI's, etc.) but also a brief history. They should know the different governing bodies, the big events, and the progress of their own club in the last few years. This training makes them knowledgeable when approached by new members, and gives context to what goes on in the district and international levels that affect their club.

School Policies - These vary from campus to campus, but walk your board through the processes, regulations, how to be approved for events, club bank accounts, and any student org benefits. Also touch on Circle K forms such as Club Event Report Forms and Event Report Forms, who to send these forms to, and their purposes.

Your Personal Board – You should spend time just talking and discussing your own board. If it's the first training retreat your board has done this should be the first workshop, in which you state your expectations, roles, and duties for board members, how board meetings are going to be conducted, and a month by month timeline of the year. Other topics that could be included are identifying strengths and weaknesses of the board, and how they can enhance or taken care of respectively, and the tone you want to set both as a board to each other, and as a face to members.

Leadership Skills – Doesn't have to, but could include:

- Public speaking – and have them practice
- Importance of proper communication
- Board etiquette – how to conduct yourself in a professional manner, what's acceptable and what's not, separating personal from club views
- Interacting with new members
- Committee building

5. Brainstorming/Goal-setting

The importance of brainstorming and goal setting is to establish a sense of direction. If you know what you want to achieve during the school year, things will be easier to accomplish. Therefore, brainstorming and goal setting gives you and your club something to try to achieve during the whole year. Many clubs establish their goals during their first board retreats.

Brainstorming:

Sketch: Start thinking about goals you want for YOURSELF and your CLUB. These goals can be realistic or optimistic.

Ex: Having a Circle K bus for transportation (*realistic- Maybe*),

Layout: Write down bullet points to make things easy. When you share it with the rest of your board, it will make this easier.



Setting Goals:

Once you and your board have established your own goals, it is time to narrow it down.

You want to see if any of your goals are similar then you can put in to a category.

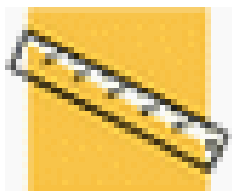
Set **SMART** goals:

Specific :

Specific - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the five "W" questions: who what when where why?

EXAMPLE: A general goal would be, "We want a certain amount of hours." But a specific goal would say, "To achieve this goal, we should do ____ service projects a month."

Measurable:



Measurable - When you measure your progress in discrete amounts, you stay on track, reach target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal.

To determine if your goal is measurable, ask questions such as.....How much? How many? How will I know when it is accomplished?

Attainable:

Attainable - When you invest heavily and emotionally on a goal, you begin to figure out ways you can make them come true. You rise to the occasion and develop the attitudes, abilities, skills, and financial capacity to reach them.

Realistic

Realistic - A goal must represent an objective toward which you are both *willing and able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low; the latter exerts low motivational force. Some of the hardest jobs seem easy simply because they were a labor of love.

Your goal is probably realistic if you truly *believe* that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.



Timely

Timely - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to achieve a goal, when do you want it?



"Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.

T can also stand for **Tangible** - A goal is tangible when you can experience it with one of the senses, that is, taste, touch, smell, sight or hearing. When your goal is tangible you have a better chance of making it specific and measurable and thus attainable.

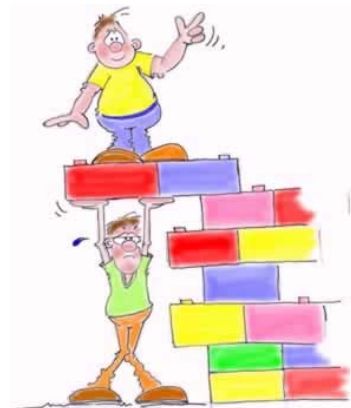
Every goal you make for your club, you decide as a **TEAM!** A good web of support separates weak and strong boards.

6. Bonding –

There are countless reasons to want a board that bonds well. The desired end result is board members willing to go out because they genuinely enjoy each other's company. A good start is icebreakers involving trust or sharing personal experiences.

One such activity by UCLA that worked really well was to sit in a circle, turn out the lights and pose a personal question - leaving it up to the individual how much they want to share. What helps get it going is when E-Board members expose themselves first to relieve pressure.

Falling trust exercises are a classic example also. Have one member stand on an elevated surface. Everyone else lines up in two rows facing each other. Each person grabs his own wrist with his right hand and grabs the right arm of the person facing him. This creates a secure net of arms behind the person falling. Use this method over a one person falling and one person catching scenario, as most people don't know how to catch. Failing to catch has happened a lot at more than one retreat.

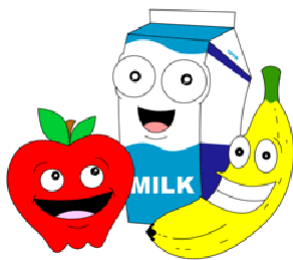


With any structured bonding exercises you choose remember to stress the lesson learned from the activities, even though it might be elementary school obvious. Also remember that structured bonding is good to start, but unstructured bonding is just as important after that. It's what really holds people together. During lunch breaks, gaps between business, and nature hikes, make sure each person's reaching out to everyone else, especially the quiet ones.

7. Food

Don't be afraid to delegate this one to someone else, not that it isn't important, but so it gets the attention of someone not worrying about everything else. Everyone likes food, it is a sure hit whether you have a short day retreat or a blowout weekend event. Here are some tips and reminders to consider before getting food.

- Make sure to get enough food for everyone!
- Ask about food restrictions such as meat, peanuts, wheat, and dairy.
- Main meals planning is key, but don't forget to include snacks!
- Keep it simple
- Have enough **water!**
- Pre-make and chop what can be prepped.
- Make sure to refrigerate the perishables whether using a fridge or a cooler– no one wants to eat spoiled food!



- Don't forget everything else, like forks, knives, cutting boards, plates, bowls, cups, plastic wrap, foil, frying pan, spatulas, matches, coals or fluid, oil or butter, garbage bags, soap, and other things not

8. Miscellaneous

General Good Tips- Keep up enthusiasm throughout, especially when things get slow. Create an open free environment where people can be themselves and speak openly. End things on a high note, such as long bouts of workshops. Have board games, cards, or small nature excursions for the down times (unstructured bonding).

Ask around! Ask any older members you trust about different retreats they've been in. What works and what doesn't. There are countless suggestions that work for certain clubs and not for others. Take careful consideration of your own club and decide what's best.

Checklist:



- Is your location appropriate/isolated?
- Are workshops specifically geared towards your board?
- Are goals concrete, and excitingly high but attainable?
- Do you have meaningful bonding opportunities both structured and unstructured?
- Were all preparations thoroughly checked out?
- Have you prepared an adequate amount of nutritious food?