

Retreat? Advance?

by Elaine Cogan

Planning a “retreat”? The public may consider it a boondoggle. Staff may look at it as an opportunity finally to get the commissioners away from distractions. Commissioners may wonder if it is worth spending additional time away from their families and businesses.

The very name can seem strange. Retreat from what or to what. One savvy manager I know calls his annual staff/commissioners meeting away from the office an “advance,” explaining, “We’ll never retreat. We always go forward.” It is doubtful that his play on words will get very far, but if you or your staff are contemplating such a session, whatever you call it, the activity should be planned and executed with care. At a minimum, the following should be clearly understood.

Why have a retreat? Many find it worthwhile to get away from the ordinary routine to discuss matters you never get around to: a vision or long range plan, for example. Some commissions hold yearly retreats to orient new members and foster good working relations. There are many good reasons. Just be sure you all agree on why you need one.

Who should attend? If you have a staff, it is unwise to schedule a retreat without including at least the planning director and possibly deputies. Whatever you decide cannot be carried forward without their concurrence and it is best to discuss any disagreements or impediments early and in the open. Additionally, you may want to invite the mayor or other elected officials whose support of planning initiatives is necessary to your success. Whoever attends, 12 to 15 people is an optimum size. This is a large enough group to include differing opinions and small enough to be managed effectively and engender camaraderie.

If your state or local “open meetings” law requires, you will also have to announce your retreat to the public and

the media. Having observers should not deter you from proceeding if you have a valid reason for holding the retreat. Even if you can lawfully meet in secret, don’t. You will be found out and suspicions about what you did and how much it cost can be damaging to the good relations you must have with your community.

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Where should it be held? Most communities have at least one nearby expensive hotel, country club, or resort that can seem to offer just the setting you need. Resist the temptation to go to any of these, even if it is provided free or at a discount. You are doing the public’s business and should never be open to questions about the propriety of using extravagant appearing quarters. Many religious orders or nonprofit organizations operate inexpensive retreat facilities in modest, restful surroundings. Such wooded or out-of-the-way locations can provide just the inspirational environment you need without raising questions from the public or the media.

Who should pay? By all means, this should be an expense of the department. Commissioners should not be expected to dip into their own pockets when they are already donating many hours of their valuable time to planning matters. Meals (without wine or liquor) and lodging should be covered, with attendees paying for any extras.

How long should it be? Weekends ...

from dinner Friday night to lunch Sunday ... seem to be favored by many retreat-goers. After a get-acquainted dinner on Friday, you can spend most of Saturday on your business, with a windup session Sunday morning. On the other hand, some find that an intensive one-day retreat, where you dispense with the socializing and get down to business, is just as effective and less intrusive on personal time.

Do you need an outside facilitator? In most cases, it is not a good idea for the commission chair or planning director to lead the discussions. You want everyone to be able to voice opinions freely and openly and not have the burden of keeping the meeting on track. The Extension Service or colleges or universities may be able to recommend a skilled individual who will charge a modest fee. There also are consultants who specialize in this work.

How do you measure success? It is important to conclude the retreat with an agreed upon list of actions or next steps. They can be related specifically to work you want to get done in a specific period of time or more generally to modes of conduct or behavior. They do not need to be quantifiable but should be sufficient to convince everyone that their time was well spent.

Retreat? Advance? By any name, it should be organized and carried forth so that it is a wise use of the time and energies of all attendees. It can, and should, also be relaxing and fun. ♦

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