

An Introduction to Club Planning Sessions (Retreats)



A Program for Club Renewal and Club Planning

PDG John Lintelow

PDG Mike Gayda & Patty Allen

WHAT IS A CLUB PLANNING SESSION OR RETREAT?

Mentioning “Retreat” often invokes a wrong perception. People, including Lions, who are not familiar with the objectives of a retreat often relate it to religious gatherings, cult activities, or a form of indoctrination to someone’s unconventional views. In fact a retreat is a very effective tool to overcome disagreements and get back on track or plan for the future. **IT IS A CLUB PLANNING OR GOAL SETTING SESSION FOR THE FUTURE.** Many companies, businesses, organizations and groups have conducted retreats to achieve an overall improvement of their organization, which includes better interaction between members of the group, improved communication and preparation for future activities. It is a meeting to bring people and ideas closer together.

REASONS TO RETREAT:

It provides a neutral setting for discussing identified problem areas and the overall health of a club can be without interference of regular business matters and all the distractions that surround and influence them at scheduled Club Meetings. It is a great experience where Lions can more easily recognize who they are and in what direction they want to go. Even strong clubs will benefit from a time to discuss strengths and weaknesses.

Retreats or Club Planning Sessions can help a club avoid the following negative scenarios or correct them once they have developed.

1. A decline in memberships
2. Fewer projects are being carried out each year
3. The same group of Lions assumes that only they have the expertise to chair projects. Newcomers’ input is ignored or bluntly rejected.
4. Over-extension by some Lions who work on every project results in burnout and eventual dropout.
5. Members’ inability to adapt to an ever-changing society. Members hang on to outdated practices.
6. Camaraderie, friendship and openness has faded away
7. Cliques are formed. Decisions are made within the cliques without Board approval.
8. Decline in meeting attendance because of boring meetings or controversy
9. Poor leadership

OBJECTIVES OF A CLUB PLANNING SESSION:

Regardless of specific items on the Session’s agenda, the following should be addressed:

1. Develop better relationships between club members by establishing and / or improving upon open and honest communication
2. Build club unity
3. Reach agreement on club matters
4. Review the club’s accomplishments and failures over the past year; evaluate
5. Identify goals and develop plans for timely accomplishment of said goals
6. Consider approaches to increase membership

ORGANIZING A CLUB PLANNING SESSION:

Pre-planning is of major importance to the success of this meeting. Ideally the event should be scheduled before or at the beginning of Lions year and ALL members of the club should be encouraged to attend. Advertising (marketing) the event is a must. Clubs should start planning by appointing a knowledgeable, open-minded Lion from their own club to act as coordinator. That Lion, with the approval of the Board of Directors, selects an OUTSIDE FACILITATOR. This outside facilitator should be a Lion who is not a member of the same club and has the necessary training as a facilitator or Retreat Leader. Under his/her direction a detailed agenda for the session is developed. Subjects to be discussed can be solicited from club members prior to the meeting. If a club is organizing their first Planning Session, they may wish to brainstorm what subjects they would like to discuss during the first part of their session.

AGENDA:

The Club Coordinator will work closely with the Facilitator who develops the agenda; which is the foundation on which the meeting is built. Careful and detailed preparation of the agenda is vital for a well-run and effective retreat. Besides the subjects Lions want to discuss, the agenda shows the location of the retreat and a time frame, stating the beginning and the end of the meeting, including breaks, mealtime and any other planned activities. If possible distribute the agenda to all participants well in advance of the retreat date, so that everyone has ample time to familiarize themselves with the subjects to be discussed. When planning the agenda, a budget should be prepared along with the list of materials and aids needed for the event.

LEADER / FACILITATOR:

The leader or facilitator for the Club Planning Session should be selected on the basis of their leadership and communication skills, their knowledge, objectivity and ability to generate, stimulate and control discussions. It is important to engage an OUTSIDE facilitator or leader to insure that he/she is objective. He/she will motivate club members to participate and to take the session more seriously than if one of your own club members were to serve as the facilitator. This leader sets the tone of the meeting. Comments or criticism with a negative underlining must be balanced by suggestions for improvement and issues should be addressed rather than the personalities of individual Lions. For sensitive subject matters the facilitator sets ground rules to avoid disharmony and to foster diplomacy and understanding. In conducting retreats the leader must be sure that no personal agenda of attendees will override the subject or nature of discussions.

LOCATION:

Part of the success of a retreat depends very much on the location where the event is held. Remember; do not select a location where your club holds regular or special meetings. It will not work! You must select a location, which is not influenced by daily routines, excessive noise or interruption by others. Recommended places are convention centers or resorts, located in a friendly and quiet setting.

PREPARING FOR THE RETREAT:

60 DAYS PRIOR TO RETREAT

A Retreat Committee is formed.
Survey of Members taken for best date and time
Committee selects and confirms outside Facilitator
Committee selects and confirms meeting place
Committee brainstorms plan to attract new members to Retreat
Member with credibility and good speaking skills explains purpose of Retreat to club members.
Public Relations: Article Put in Club Bulletin and on Club Web Page

30 DAYS PRIOR TO RETREAT

Public Relations: New Article in Club Bulletin and on Club Web Page
Attractive Flyers distributed at each meeting (Include map if needed)
Committee contacts Club Members personally inviting them to attend Retreat.
Decide on Refreshments (lunch or light snack)
Hand out Club Feedback Forms to be returned to Committee before Retreat.

ONE WEEK PRIOR TO RETREAT

Committee confirms location, time and any pertinent information with site manager
Phoning Committee calls to remind all members of Retreat
Flyers with map made available at club meeting
Facilitator contacted for any necessary changes
List made of things to bring: flip chart, felt pens, tape, handouts etc.

DAY OF RETREAT

Designated Committee members arrive at retreat site at least 45 minutes before meeting begins
Facilitator arrives 30 minutes early
Provide Name tents for benefit of Facilitator even though members know each other.
Agendas passed out
Retreat Evaluations completed by attendees before leaving.

FOLLOWING RETREAT

Thank you note sent to the Facilitator and site manager.
Report made to club

The heart of the retreat is finding what matters to your members, employing techniques that will improve the issue and ways to measure that improvement.

REVIEW:

Why have a Club Planning Session / Retreat?

- To introduce and involve a new member
- Set organizational goals
- Increase morale and team building
- Motivate members for the new year
- Hear new ideas

When should your organization have a Club Planning Session / Retreat?

- At the beginning of the year
- At midyear for an evaluation or a refresher
- Prior to a conflict
- Before new officer installation
- Before a major project

Who should participate?

- Members
- Officers

How to plan a Club Planning Session / Retreat:

Determine the purpose.

Decide who to invite.

Decide where and when it will take place.

Determine the budget.

Develop an agenda.

Determine what supplies, materials and handouts are needed.

Arrange for food.

Reminders (marketing)

Is transportation necessary?

At the Planning Session / Retreat

Set the tone for a serious, open-minded, honest and cooperative discussion

Clean-up after the Planning Session / Retreat

Evaluate the Club Planning Session / Retreat!

Send thank you notes