TEAM RETREAT GUIDELINES

September 27, 2013
Role of Team Retreats Aligned with College Strategy

• The SLT
  • Fully supports using Team Retreats to develop our employees
  • 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, four standard Team Retreat topics have been approved by the SLT:

- Strengths Finder
- Customer Focus (Johnny-the-Bagger program)
- Change Readiness Overview
- Mission and Vision statement development

• 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
  • 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 by the respective SLT member is required for Team Retreats:
  • Leader submits a Request for a Team Retreat through their leadership chain including their SLT member
• After SLT approval, Leader contacts the Organizational and Talent Development (OTD) Team to plan the retreat
  • Recommended that requests to OTD Team be at least 6 weeks prior to the retreat to ensure availability of a facilitator
• Leader is responsible for coordinating the retreat (facilities, food, materials, etc.)
Requesting a Team Retreat

The Team Leader provides a proposal to SLT Member prior to scheduling team retreats

- A template is available to assist Leaders in developing a proposal
- At a minimum, the proposal will include:
  - Reason for the retreat
  - Current team issues
  - Expected outcomes
  - Topics to be covered
  - Length of retreat
  - Number of participants
  - Cost for the retreat
- SLT member may, at his/her discretion, request additional information
Leader Summary of Team Retreat

Upon conclusion of the retreat, the Team Leader provides a summary report to all leaders within the leadership chain including the SLT Member

• A template is available to assist Leaders in developing a proposal

• At a minimum, the summary report will include:
  • Outcomes achieved
  • Expected positive impact on the team
  • Next steps leader and team will take to ensure on-going progress
  • SLT member may, at his/her discretion, request additional information
In accordance with our commitment to fiscal responsibility, the SLT has implemented college-wide standards for team retreats

- Facility standards
- Food and refreshment standards
- Miscellaneous costs for supplies and incidentals
Facility Standards for Team Retreats

• The default expectation is that team retreats will be held at college facilities

• Certain circumstances may be conducive to off-site retreats
  • Requests for off-site retreats require the approval of the respective SLT member. The guidelines for off-site retreats:
    • 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, lap top 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 team leader to locate these facilities
Food & Refreshment Standards

Full Day Retreat

• 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 is 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 Retreat

- 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 from those listed below:
  - Breakfast
  - Lunch
  - Mid-morning or mid-afternoon snack
Supplies & 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

- Cost containment ideas:
  - Re-use “fidget” 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