

THE BEST OPENING RETREAT EVER

GOALS

CREATE CONNECTIONS AMONG GROUP MEMBERS: Our imperative for the Opening retreat is for all group members to have significant familiarity with every other group member.

LESSER GOALS

Overview of the program: Ideally, a short Orientation precedes the Opening Retreat, but Opening Retreats are sometimes the first time a group has been convened. If no Orientation is held, one of the goals for an Opening Retreat should be to give the group members a look at the remainder of the program, what the topics will be, what processes will be used, and what the expectations for participation are.

Introduce content: Opening Retreats may also include segments that are content-driven, such as the history of local leadership, information about group projects, or an introduction to key concepts, such as servant leadership or philanthropy.

GETTING STARTED

THE "MANAGEMENT"

Volunteers Leadership Oklahoma City's Opening Retreats are run by the Program Co-Chairs with staff support. Each program has a pair of Program Co-Chairs, a man and a woman, who are responsible for the planning of all class sessions. They usually convene committees that bear the bulk of the responsibility for individual class sessions, but the Program Co-Chairs manage the Opening Retreats themselves. LOKC has, over the years, devised a process that works well for our Retreats, accumulated a file of alternate activities for special circumstances, and acquired or built the props and written the instructions for all the exercises. As a result, the Program Co-Chairs, who serve a two-year term and shadow for a year prior to their term, are easily able to manage the Retreat with minimal experience and preparation.

No Outsiders In the past, we used outside consultants for all or large parts of the Retreat. Doing so allowed us to include activities that we cannot easily produce ourselves, such as a high ropes component or certain personality inventories that demand a psychometrist to administer. However, we often discerned a disconnect between the group and these one-time-only presenters, occasionally a fairly serious one, a "them against us" feeling. In addition, the Program Co-Chairs felt like useless appendages, limited to introducing the trainer and then standing in the back of the room.

One year, the week before the Retreat a consultant from the Pacific Northwest who was scheduled to run the entire Retreat for us (at great expense), fell off his bicycle and was in a coma. We scrambled to take on the Retreat ourselves, farming a few parts out to local professionals as necessary. It was a much better Retreat than those that preceded it. The Program Co-Chairs connected with the group at a much deeper level, there was no "outsider"

mentality, it was much less expensive, and we were able to control the flow of the Retreat to a much greater degree.

Preparations In future years, we took additional steps to assume complete responsibility for the Retreat. One of LOKC's staff members was certified to administer the personality inventory we prefer, True Colors. A number of LOKC volunteers have also been certified, sometimes at LOKC expense, as True Colors trainers, so we have a cadre of staff and volunteers who can administer the inventory.

Low Ropes Only We also eliminated the high ropes component of the Opening Retreat. High ropes activities are usually individual activities, and no amount of praising the belayer and encouraging cheers and support from the onlookers really overrides the individual nature of the accomplishments. Our goal for our Opening Retreat is creating connections, teams, and a group mentality. As a result, we moved high ropes activities out of the Opening Retreat. We sometimes employ high ropes as part of a Closing Retreat or optional day when individual achievement is a logical component. A collateral benefit to eliminating the high ropes component has been an increased capacity to include less physically fit group members more fully. In the past, the disabled and damaged (someone's always recovering from ACL surgery or a torn rotator cuff) were sidelined. And our Program Chairs are easily able to facilitate low ropes exercises.

Portable Many of the low ropes exercises, however, are fine team-building activities. Some we cannot reproduce in a moveable format, but there are many that we have been able to make portable. Our Spider Web, for example, assembles in minutes from color-coded PVC pipe and string, and can be used indoors or out. Our Land Skis were shortened to fit in a standard SUV. We try to add a piece of low ropes equipment anytime we see one we can make portable and run safely.

Having program volunteers and staff facilitate the Retreat connects them to the group as more than they are when an outside consultant or trainer is used.

MANDATORY ATTENDANCE

Opening Retreat should be mandatory for all group members. The date of the Opening Retreat is always published with the application so applicants know the dates far in advance, and potential applicants who call and ask if they can be excused from the Retreat are told no. The only time we excused a group member from participating in the Opening Retreat was the week of September 11, 2001. One member was stranded in Washington DC in the travel shutdown following 9-11. While excusing him was doubtless the right thing to do in that circumstance, he never assimilated into the group well, having missed all the activities through which the class created its common language.

We encourage members who have truly significant conflicts arise (death in the family, jury service) to defer participation to the next year. Anything less than death or jury service results in removal with the option to re-apply.

LOGISTICS

Time: For Leadership Oklahoma City's traditional adult program, the Opening Retreat is two full days and an overnight, an 8 a.m. start on Thursday morning and adjournment at 5 p.m. the next day. Opening Retreats for other programs range from a day and a half without an overnight to a single day of 8 hours or longer.

Place: Selecting an appropriate location for an Opening Retreat is vital to the success of the event. The single most important criterion is a room large enough for all group members to sit at tables of no more than 8. Fixed, theater-style seating simply will not work. Group members must be able to break into small groups, preferably with a shared writing surface.

Other desirable attributes for an Opening Retreat site include access to an outdoor space large enough for activities, breakout spaces, an isolated or self-contained location, kitchen facilities or acceptable food service, a good icemaker, and onsite overnight accommodations if needed.

Many meeting spaces that work well for other events do not work well for Opening Retreats. The capacity to rearrange the space quickly for different activities is essential. Many activities work best in a sequence of spaces: whole group standing together, small group breakouts, whole group seated for the debriefing, for example. Tables and chairs that can be moved by the group members into different configurations are best.

A space that is part of a larger location where other meetings and events are co-occurring, such as a hotel or conference center, can create distractions ranging from the wrong folks wandering into your event to the clamor of a cheerleading convention's shouts, claps, and thumps as your soundtrack.

Sites with easy access to attractive alternatives, such as shops, bars, or cafes, can result in your attendees slipping away for a tall mocha decaf, or worse, a group declaring happy hour and returning in less-than-sober condition.

Outdoor space is a plus only if it is out of foot and vehicle traffic flow and not subject to parking. Empty parking lots can work quite well for some activities, but not if cars park there. Just because a lot was empty when you visited doesn't mean it will be empty the day of your event. Outdoor areas with very steep grades, many holes, protruding roots or a tendency to be muddy are usually not suitable.

Comfort: Uncomfortable group members are distracted. Don't insist on an outdoor activity if it's raining or very hot or cold. Our Opening Retreats often occur during the months of August and September, when the temperature can be over 100 degrees in the afternoon. Consequently, we usually schedule our outdoor activities in the morning. If the weather report promises rain in the morning, we flip-flop some activities in hope of having a dry period for the outdoor action.

Appropriate, indoor seating for everyone is another comfort concern. Meeting around someone's pool or in a large living room may seem like a lovely idea, but being squished onto a sofa with three strangers, shading your eyes from the sun for hours, or trying to eat from a plate balanced on your knees with the host's Yorkie begging for your ham sandwich will not have good results. Immunize yourself from the pleas to move a work session outside because "it's a beautiful day." Save the nature experiences for activities that don't require reading or writing.

HOW TO ORGANIZE ACTIVITIES

SIZE MATTERS

Activities should move from the smallest possible groups (2 partners) to larger groups, concluding with whole group activities. A progression of this sort builds relationships at a comfortable level. At the beginning, group members will get to know others one at a time. As the activities move towards larger groups, individual group members are more likely to have already met one or two members within the larger group, so they are not thrown into an activity with many strangers.

Within similar activities, the size of the groups should likewise move from smaller to larger. For example, learning the names of other group members is a critical activity. Trying to learn 40 or more names in one activity is daunting, but first learning a few names, then a few more, then all the names is easily achievable by most people. We have used this method with groups as large as 60 with excellent results.

PROGRESSIVE ACTIVITIES FOR LEARNING NAMES

1. *Small group: Name Game with Signs: Groups of up to 12 associate names, adjectives and motions with each group member: Bouncing Beth, Jumping John, Leaping Larry, Dancing Diana*
2. *Larger or whole group: Plain Name Game: The whole group (up to 60) learns the first names of every group member in alphabetical order: Amy, Ann, Beth, Brad, Brad, David, Juan, Louis, Malcolm, Rayshon, Renata, Susan, Zach...*
3. *Practice: 2 teams compete in Name Game with Tarp: One member from each team faces a member from the other team and attempts to call out the name of that person first. The "loser" goes over to the winning team.*

EXERCISES FOR RANDOMLY MIXED SMALL GROUPS

Experiential Learning Cycle exercise (4-6)

Spider Web (10-25)

Land Skis (Group of 10-25 divided into teams of 4-8)

Cup O' Visions (whole Group of 20-60 divided into teams of 10-16 with each team made up of pairs of partners)

EXERCISES FOR GROUPS THAT SHARE A DEFINED COMMONALITY

Personality Style exercises

We like "Colors" better for our leadership classes than other personality profiles we've used, including Myers Briggs, DISC, Left Brain/Right Brain, and FIRO B.

- The Colors inventory makes it easy to remember others' preferred style; there are four simple colors rather than many possible combinations of letters.
- A common language among class members and between classes is created. Class members report that colleagues who are graduates will ask them "what color are you?" upon their return from the Opening Treat. Presenters from previous classes often refer to the Colors Inventory, knowing that LOKC has used the same inventory for many years.
- Because the Colors Inventory combines a fairly broad range of attributes in a "color," class members find that they can apply what they learn about adapting to other personality styles to others. They can guess, with a fair degree of accuracy, what "color" a spouse or co-worker is, and adapt or communicate their needs accordingly.
- The training to become a certified Colors training is reasonably accessible to lay people; there are many classes available and it does not require a degree or months of training.
- The materials are self-scoring, so the inventory does not have to be completed ahead of time and sent in to a scoring facility.

- The materials are inexpensive. Various “Colors” individual inventories are available, usually for less than \$10 per person.
- The exercises can be adapted to different groups. For example, for one of our programs that includes participation in community projects, we have created exercises that demonstrate how certain types of community work appeal to certain personalities.

EXERCISES FOR WORKING AS A WHOLE GROUP

Cup of Visions

Building Bridges

GETTING PERSONAL

Increasingly personal: Activities should move from less personal to more personal. The information class members share with each other, that is, should begin with the least personal—one’s name—and move toward more personal information—one’s preferred learning style, for example. Some activities are not suitable for Opening Retreats because they require deeply personal sharing in order to be most effective. You can’t demand trust; you have to build it, and building trust only occurs over time.

Non-threatening personal information icebreakers: INDIVIDUALS SHARE INFORMATION WITH GROUP

The simplest icebreaker is one in which group members are asked to answer a question. The questions, initially, should be those for which everyone will have an answer that is not likely to embarrass them in any way.

- Where were you born?
- What did you want to be when you grew up when you were 16?
- Where did you attend high school?

But not:

- Where did you attend college? (likely not everyone did)
- Biggest disappointment in life (too soon to hear about a bitter divorce)

Questions can be related to the time of year or event, such as

- What is your favorite time of year and why?
- What was the best sporting event you ever saw?
- Tell us about a group you’ve belonged to in the past, friends, family, faith, or special interest

ACTIVITIES THAT REQUIRE SHARING SMALL BITS OF PERSONAL INFORMATION IN A SMALL GROUP

Talking ‘Bout Myself

United We Stand

Two Truths and a Lie

Birds of a Feather

ACTIVITIES THAT CREATE CONNECTIONS

Creating connections among group members is the most important goal for the Opening Retreat.

GETTING TO KNOW INDIVIDUALS

By the end of the Opening Retreat, class members will have called every other class member by name several times and will be able to identify a majority of the class members by name. They will also know quite a bit about many other class members' histories, perspectives, and experiences.

ACTIVITIES FOR LEARNING NAMES

Always use name tags at every event and encourage group members to identify themselves when they speak.

Plain Name Game

Name Game with Signs

Name Game with Tarp

ACTIVITIES FOR LEARNING ABOUT OTHERS: PERSPECTIVES, BACKGROUNDS, EXPERIENCES, PREFERENCES

Shared interests and characteristics: class members learn who in the class has commonalities with them

Unique perspectives and backgrounds: class members learn how other class members are different from most of the others, what some of their unique experiences and preferences are.

Demonstrates how interesting a collection of people this class is

Gives class members access to varying points of view, values, and experiences

Activities for Learning about Others

Scavenger Hunt

Talking 'Bout Myself

United We Stand

Personality Styles: "Colors"

ACTIVITIES FOR WORKING WITH OTHERS

Experience with others: Class members work in groups, learning what others bring to the task, how to adapt to others' preferred styles, how to communicate more effectively with others

Experiential Learning Cycle Exercise

"Colors" exercises

Spider Web

Land Skis

Trust Walk

Cup O' Visions

Building Bridges

ACTIVITIES THAT DEMONSTRATE OBSTACLES TO EFFECTIVE TEAMWORK

Roadblocks: Group members participate in exercises designed to demonstrate blocks to effective teamwork such as stereotyping or poor communication

Lost on the Moon

Color Blind

APPENDIX

LINK TO ONLINE COPIES OF HANDBOOK MATERIALS

<http://www.lokc.org/Resources/tabid/57/Default.aspx>

ABOUT LEADERSHIP OKLAHOMA CITY, INC.

LEADERSHIP OKLAHOMA CITY DEVELOPS LEADERS FOR CIVIC SERVICE.

Leadership Oklahoma City (LOKC) is a 501(c)(3) nonprofit organization, founded in 1981, dedicated to increasing the pool of volunteers who have the capacity to be effective forces of positive change in the community.

THE STRATEGIES by which Leadership Oklahoma City advances this mission are:

Educating about the community's needs, resources, and opportunities;

Training in skills necessary for effective community leadership; and

Connecting people from diverse backgrounds and perspectives with a common interest in community improvement.

THE PROGRAMMING: These three strategies are used in Leadership Oklahoma City's programming, which target two population groups:

ADULT PROGRAMMING currently includes:

The Signature Program, now in its 27th year, a community information program;

The LOYAL (Linking OKC's Young Adult Leaders) Program, a skills-based program; and the

Alumni Association, which provides continuing education and connections to adult program graduates.

YOUTH LEADERSHIP EXCHANGE (YLX) PROGRAMMING currently includes:

Leadership Skills program, for high school sophomores and juniors, a community information program;

Youth in Action program, for high school sophomores, juniors, and seniors, a skills-based program; and the

Youth Council of Oklahoma City, for high school juniors and seniors, a project of the City of Oklahoma City managed by YLX, which educates and involves teenagers in city government.

GOVERNANCE

A 38-member Board of Directors governs Leadership Oklahoma City. A 12-member Executive Committee meets between regular meetings of the Board. In addition, the Youth Leadership Exchange program, the umbrella for high school age programming, is governed by the 40-member YLX Board of Directors, which includes graduates of YLX programs. The YLX Board is a separate class of Directors for LOKC. Finally, the Alumni Association elects its own Executive Committee members and class representatives, who operate as the governing board for adult alumni activities.

STAFF

Executive Director: oversees adult classes, fund raising, and is the liaison to the LOKC Board of Directors

Deputy Director: oversees accounting, publications, and the Alumni Association and is the liaison to the Alumni Board

Youth Director: oversees youth classes and is the liaison to the YLX Board of Directors

Program Assistant: part-time staff assists with administrative work and youth programming

FUNDING

Annual Budget ~ \$350,000	Endowment and Interest	65,000.00	
Annual Campaign	75,000.00	Endowment gifts	500.00
Alum Dues	60,000.00	Membership List Sales	1,000.00
Tuition, LOYAL	17,500.00	Application fee	3,250.00
Tuition, Signature	82,500.00	Grants:	5,000
Tuition, Youth Programs	0.00	Youth Council of OKC	28,000.00
Alumni Event Income	18,000.00		

SAMPLE OPENING RETREAT AGENDA FOR ADULTS (2 DAYS AND OVERNIGHT)

Thursday, September 6

8:00 a.m.	<u>BREAKFAST AND BUSINESS MEETING</u> American Red Cross of Central Oklahoma, 601 NE 6 th St. <u>WELCOME TO THE AMERICAN RED CROSS OF CENTRAL OKLAHOMA</u> Vince Hernandez , Chief Executive Officer
8:30 a.m.	<u>LEADERSHIP IN OKLAHOMA CITY: AN HISTORICAL PERSPECTIVE</u> Dr. Bob Blackburn , Executive Director, Oklahoma Historical Society Jim Loftis , Principal, Loftis Architects
10:00 a.m.	<u>BREAK</u>
10:15 a.m.	<u>BUS LOADS</u>
10:30 a.m.	<u>BUS LEAVES</u> Scavenger Hunt
11:30 a.m.	<u>ARRIVE ST. CRISPIN'S</u>
12 noon	<u>LUNCH</u>
12:45 p.m.	<u>ACTIVITIES</u> Talking "Bout Myself Name Game with Signs Name Game
2:30 p.m.	<u>BREAK</u>
2:45 p.m.	<u>EXPERIENTIAL LEARNING PROCESS</u>
5:00 p.m.	<u>RECEPTION</u>
6:00 p.m.	<u>DINNER</u>
7:00 p.m.	<u>TRUE COLORS</u> Christy Zolley
9:30 p.m.	<u>SOCIAL</u>

Friday, September 7

8:00 a.m.	<u>BREAKFAST</u>
8:30 a.m.	<u>ACTIVITIES</u> Name Game with Tarp Land Skis Spider Web Cup o' visions
12 noon	<u>LUNCH</u>
12:45 p.m.	<u>ACTIVITIES</u> Lost on the Moon
2:00 p.m.	<u>ISSUE GROUP DISCUSSIONS</u>
3:00 p.m.	<u>DEBRIEFING</u>
3:30 p.m.	<u>BUS DEPARTS</u>
5:00 p.m.	<u>ARRIVE AMERICAN RED CROSS</u>