

THE OFFICIAL EDUCATIONAL JOURNAL OF THE  
AMERICAN SUBCONTRACTORS ASSOCIATION

THE **CONTRACTOR'S**



FIRST QUARTER 2006

**Compass**

**LEADERSHIP:**  
**Putting  
Principles  
Into Action**

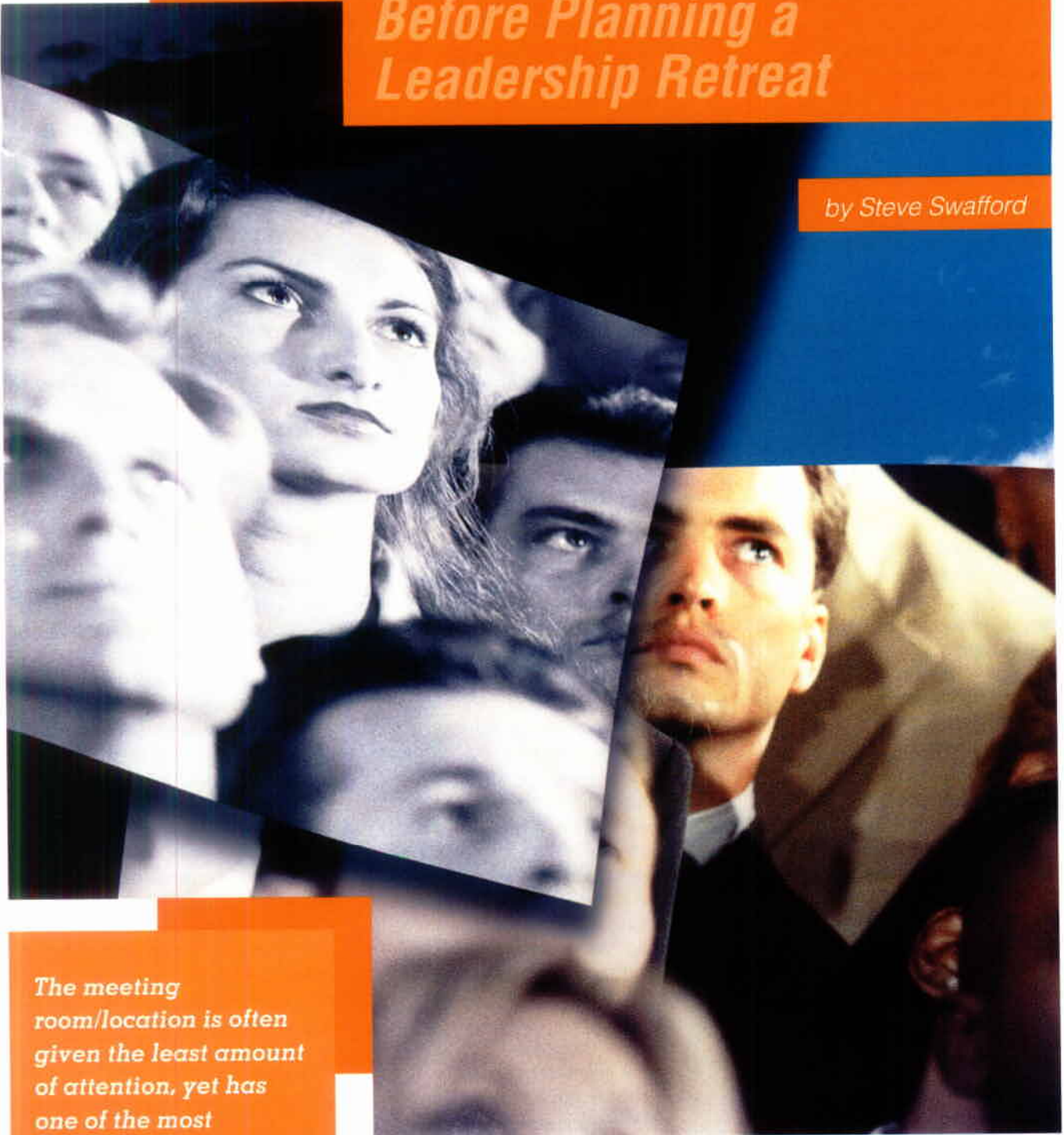
- **Planning** a Leadership Retreat
- **ASA** Leads State Reform Efforts
- **Branching** Out to Solve Employee Turnover Problems
- **RFID** Technology Spurs Contractors' Interest





## *What You Need To Know Before Planning a Leadership Retreat*

*by Steve Swafford*



*The meeting room/location is often given the least amount of attention, yet has one of the most significant psychological impacts on participation and productivity.*

Owners and general contractors continually grapple with effective ways to secure specialty trade firms that are a good fit for their projects. They generally select partner companies they have done business with in the past, or they receive a referral from a trusted source or colleague. Either way, it's all about relationships and doing business with those whom you trust and who will deliver a quality product on time.

The same technique applies when searching for and selecting a facilitator for your company's leadership program and/or team retreat. Just as there are one-person contracting "companies" who take their beat-up 1981 white pick-up to a sign shop and slap some construction name on the door panel, the equivalent exists in the facilitation/leadership consultant arena. It's a good

the most significant psychological impacts on participation and productivity. Groups that try to conduct sessions at their offices have greater difficulty in getting co-workers to focus on the task; many get distracted with their own unique business or client needs. That's because planning in a familiar environment tends to make it more difficult to look at challenges or

conversation is to list the key issue, objective and strategy numbers next to agenda items for future company staff meetings. The plan should be integrated into every aspect of the organization, such as employee performance objectives, staff meeting agenda items, and any new projects that evolve.

Any goals that evolve as a result of the retreat should be S.M.A.R.T. goals. S.M.A.R.T. stands for goals that are **Specific, Measurable, Attainable, Relevant, Time-bound**. It is common to develop goals from a retreat that are missing either the "measurable" or the "time-bound" element. Be sure to make any goals S.M.A.R.T. goals.

**What should your organization expect from a facilitator?** A good facilitator should be a good listener. If a facilitator is a good listener, then he or she can effectively engage in the level of research needed to achieve the desired goals of the organizational leadership and guide the company into new areas of development and performance.

During the session, the facilitator should be checking in routinely with the president and/or key executive to secure feedback on the staff retreat.

Planning a staff retreat and/or leadership program is much like a construction project with site selection; planning blueprints; and agreement on how the project will be finished/detailed. It's critical for all parties to understand the process and scope of responsibilities. As in a construction project, there should be a careful blend of process and creativity to ensure the project is unique and generates energy after the event is completed. Finally, careful attention should be given to the meeting room, group dynamics, and opportunity for participants to socialize as a means of creating a stronger leadership team.

*As in a construction project, there should be a careful blend of process and creativity to ensure the project is unique and generates energy after the event is completed.*

idea to check a facilitator's references and do some background research on his or her facilitation approach.

It's important to go with a company that has a proven track record and that creates an event that is both purposeful and practical for your program and/or retreat. If a company doesn't have an existing relationship with a retreat facilitator, then ask for references from those industry colleagues who have done similar programs.

#### **Why do some retreats succeed and others fail?**

Some companies hope a retreat will be the 'silver bullet' that will resolve their organizational problems. It's important to remember that some problems/conflicts that exist in the culture didn't evolve in one day, and they won't be resolved in one day either.

**What should a company consider when planning a staff retreat?** It's also important — if possible — to identify whether there is a "big stinky elephant issue" that co-workers are uncomfortable sharing openly. One strategy to assist in identifying these issues is to do an anonymous feedback survey of the participants prior to the event. For this to be most effective, it should be conducted with your facilitator as part of his or her work in developing your event/retreat. The survey also provides a venue to capture expectations and perceptions in an anonymous and safe environment.

**What aspect of the retreat/event is often overlooked in planning?** The meeting room/location is often given the least amount of attention, yet has one of

opportunities in a new way; instead it often produces the familiar or status quo.

Another critical aspect is how the retreat room is "set" or created for the participants. For example, a dimly lit room with rows of chairs set facing a large screen creates a different perception compared to a brightly illuminated room that is set with round tables and has upbeat (not loud) music playing. Room selection for a retreat plays a significant role and is often an overlooked strategy than can enable the retreat/event to start off on a positive note.

**How can a location outside the office be secured without spending a lot of money?** If resources are limited, consider swapping space with another company that has good meeting space. Or consider other community sites (e.g., zoo, bowling center, museum, libraries, etc.) that might fit a retreat theme. Sometimes it's difficult to know where to start for an energizing retreat location. One tip is to take a walk in the yellow pages and look under such topics as "party planning," "banquet facilities," "caterers," "conference centers," "meeting facilities," and check out members listed in the Chamber of Commerce. These may trigger some ideas that might otherwise be overlooked for a creative venue.

**If the retreat is more strategic in nature, what should happen afterward to reinforce the information gained during the day?** The facilitator should integrate any decisions into the organization's culture and have ongoing conversations with the company. One way to make the plan an integral and ongoing

*Steve Swafford is a principal and co-founder of Leadership Outfitters Inc., a leadership development and interactive facilitation company with offices in Los Angeles and Washington, D.C. He can be reached at (310) 428-6795 or [swafford@leadershipoutfitters.com](mailto:swafford@leadershipoutfitters.com).*