



American MENSA®

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# **Retreat Planning Guide**

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## Introduction

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The *Retreat Planning Guide* provides step-by-step direction to plan and facilitate a retreat for the leaders of a local Mensa group. A retreat is structured discussion that creates teamwork and focus. The agenda for the retreat guides participants to:

- Create a purpose statement for the local group that outlines the group's mission.
- Evaluate the strengths and weaknesses of the local groups operations.
- Set goals from which the local group can launch focused, manageable improvement efforts.
- Set a follow-up plan and timeline describing when and how movement toward goals will be reviewed and adjusted.

New ideas on this format are always welcome. Communicate questions and suggestions to the Leadership Development Committee Chair and National Groups Coordinator.

## 1.0 Setting up the Retreat

### 1.1 Why have a retreat?

A retreat brings together leaders of a local group to plan, in a systematic way, for the group's future. Participants develop a shared vision and goals and improve their ability to coordinate their efforts to implement these goals.

The retreat also provides the opportunity for local leaders to become better acquainted and to see themselves as part of a leadership team.

It is recommended that each local group develop an annual habit of meeting for a retreat.

### 1.2 Who should attend?

Retreats often work well if all members are invited to attend. This includes all elected and appointed officers, including Local Area Coordinators, plus members who have any official responsibility or who cycle in and out of leadership roles.

If the local group is closely aligned with one or more neighboring groups, a representative of the other groups can be invited.

Advertise the planned retreat in the newsletter and on the Web site to attract potentially active members to the retreat. Their fresh perspectives can be eye-openers.

### 1.3 How much time is required?

The retreat agenda requires four to eight hours to work through, depending on the size of the group.

If the group has had recent retreats, or if the written materials are distributed in advance and attendees read and think about the materials, the retreat can be completed in four or five hours. A larger group (10-plus) or any group that has not been meeting together regularly may require up to eight hours.

### 1.4 Funding?

The local group, local members, Regional Vice Chairman's funds or Leadership Development Workshop funds may cover the minimal costs for a retreat. Prior approval must be obtained to use LDW funds. For more information, see the *Leadership Development Workshop Guide*, Section 1/Other

Leadership Training/ Planning Retreats or contact the LDW Coordinator.

### 1.5 What facilities and materials are required?

A professional meeting room in a business, school or library is the ideal venue. Members can often secure these on a Saturday or Sunday.

The retreat can be held at a member's house as long as chairs can be set up in a semi-circle and there is space to write on and post flipcharts. The meeting facilitator will need a flipchart pad with stand, pens and tape. A supply of small brightly colored stickers should be purchased, at least 12 per participants.

Each participant should be given a copy of the *Retreat Planning Guide* before retreat and asked to complete the worksheets in Section 2.3 step 2.

Usually lunch or dinner is provided.

### 1.6 Who should facilitate?

Someone must act as the facilitator for the meeting. His or her role is to move the group through the steps in the agenda, keep the group from wandering off to another topic, mediate conflicts and facilitate consensus. (Consensus means only that each member's opinion has been heard and that everyone can live with the decision made.)

The facilitator should have experience running participative meetings. Generally professional trainers, middle managers, teachers and human resource development professionals have this experience. The facilitator should be someone who is regarded as fair and neutral and can be expected to welcome all inputs. LocSecs often prefer to have someone else lead the meeting to enable them to fully participate and to be able to listen carefully. Without a skilled facilitator, the retreat will get bogged down and will not be productive.

The retreat works best when the facilitator uses flipcharts to capture all ideas and follows the agenda outlined in this *Retreat Planning Guide*. The worksheets can be transcribed later. Hourly breaks, even if brief, help participants to keep focused. If you plan a full day, it is better to bring food in rather than adjourn to eat.

To keep the retreat moving in a positive direction, these ground rules should be established at the start

of the meeting by the facilitator and supported by the LocSec:

- Think about your idea before sharing it,
- Keep comments short and try to speak in “sound bites,”

- No put-downs or personal attacks allowed,
- If good solutions come up in Steps 1 and 2, make a note and save them for the final steps in Goal Setting, Step 3.

## 1.7 Timeline

- |   |   |                                     |
|---|---|-------------------------------------|
| 1 | The LocSec discusses the concept informally with elected officers. Each receives a copy of the <i>Retreat Planning Guide</i> .  | <b>3 months before</b>              |
| 2 | The Executive Committee agrees to hold a retreat and finalizes the date, location, times, meal arrangements, who to invite and who will facilitate. An announcement is printed in the newsletter and on the Web site. The LocSec personally invites local leaders not at the meeting. | <b>2 months before</b>              |
| 3 | The LocSec finalizes attendance and arrangements including location, meal arrangements, facilitator, copies of <i>Retreat Planning Guide</i> , flipchart and pens. Reminds all of retreat at meetings and by phone.   | <b>1 month before</b>               |
| 4 | The LocSec and facilitator arrive early to arrange the chairs, set up flipchart and review the agenda. The retreat takes place.   | <b>Retreat day</b>                  |
| 5 | The results of the retreat are published in the newsletter and on the Web site. The LocSec ensures that the implementation of the goals is discussed and followed-up-on at Ex Comm meetings.  | <b>1 month after</b>                |
| 6 | Review at Ex Comm of progress on group goals.<br><br>Review of personal pledges to do certain tasks.  | <b>3, 6, 9, and 12 months after</b> |
| 7 | Ex Comm begins planning for the next retreat.   | <b>9 months after</b>               |

## 2.0 Retreat Agenda

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### 2.1 Overview

The following major sections of the agenda are documented later in this *Retreat Planning Guide*. Start with Step 1 and work through 3. Each will take about the same amount of time unless the group has done regular retreats.

Start by assigning the amount of time you will devote to each and manage the retreat accordingly. Step 2 requires reading beforehand. If this is not done, care must be taken to keep the discussion moving. All Steps require discussion and consensus.

#### 2.2 Step 1. PURPOSE STATEMENT

**Start Time:** \_\_\_\_\_ **Finish Time:** \_\_\_\_\_ **Total:** \_\_\_\_\_

Follow the instructions to develop a Purpose Statement for the local group.

#### 2.3 Step 2. EVALUATION OF CURRENT OPERATIONS

**Start Time:** \_\_\_\_\_ **Finish Time:** \_\_\_\_\_ **Total:** \_\_\_\_\_

Complete the worksheets as a group for each “building block” to evaluate the current operations.

#### 2.4 Step 3. GOAL SETTING

**Start Time:** \_\_\_\_\_ **Finish Time:** \_\_\_\_\_ **Total:** \_\_\_\_\_

Follow these instructions to synthesize the work from Steps 1 and 2, to develop goals and plans for implementing improvements.

**Total Duration of Retreat:** \_\_\_\_\_



## 2.2 Step 1: Purpose Statement

Open the meeting with introductions and an overview of the agenda. Go over the ground rules and determine what other rules should be followed to ensure that the retreat stays within the time limits established.

Explain the reasons for a Purpose Statement: "It is important to begin our discussion by revisiting your local group's purpose. A purpose is a short statement of the mission of your local group; it explains what your local group contributes. Without a purpose, you will be buried in the tasks that need to be done and lose sight of why you are doing these tasks."

Follow this process to develop your Purpose Statement:

A. Ask each member: "Why do you enjoy Mensa?" "Why are you involved?" "What does our Local Group provide for you?" List these questions on a flipchart or pad. Ask for at least two ideas from each member present.

EXAMPLE:

1. Belonging to a community
2. Feeling 100 percent (maybe 99 percent) accepted
3. Opportunity to socialize with fascinating people
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

B. Review the purpose of Mensa:

"Mensa's purposes are to identify and foster human intelligence for the benefit of humanity; to encourage research in the nature, characteristics and uses of intelligence; and to provide a stimulating intellectual and social environment for its members."

C. Ask each participant to place three stickers on the flipchart to show what items he or she thinks are most

important. All three stickers can be placed on one item or on separate items.

D. Develop a statement of purpose for the local group. Keep your statement brief, one or two sentences.

Example: "The purpose of the XX group is to provide a supportive and tolerant community for its members."

If you are unable to agree on a brief statement, create one that incorporates the major ideas.

For example, the following was the Purpose Statement of Western Washington Mensa:

- To offer a welcoming and accepting "neighborhood"
- To stimulate our members' intellectual curiosity
- To create an environment which permits healthy challenges
- To foster respect for intelligence in our diverse community
- To serve as a forum for communication amongst members and the larger Mensa neighborhood

San Francisco Mensa developed a shorter Purpose Statement:

- To provide and encourage social and intellectual interaction amongst diverse people

E. Revise your Purpose Statement until all are comfortable with it. Change wording, add clarification or completely rewrite it. As a final check, ask these questions:

Is this what we should be providing for our local members?

Does this adequately describe our reason for being?

F. Remove all flipcharts from view except for the final purpose statement.

## 2.3 Step 2. Evaluation of current operations

Before the retreat, each individual should have read through each building block and completed the related worksheet. Ask participants to take out their completed worksheets. Those who have not completed worksheets will be asked to read through the information quickly as the discussion continues.

Remind the participants: "The 'building blocks' that will be discussed are important for the effective functioning of every local group. How each is carried out varies with the size of the group, personality of the local leaders and the focus of the group. No group is expected to perform well in all the building blocks."

Go over the following information and explain that there are consequences for increasing or decreasing the effort expended in each building block.

<b><u>BUILDING BLOCK</u></b>	<b><u>RESULTS OF INADEQUATE INVESTMENT</u></b>	<b><u>POSSIBILITIES WITH A MAJOR INVESTMENT</u></b>
Newsletter and Web Page	Drop in participation and interest	Increased participation and interest
Testing	Decline in membership	Influx of new members with energy and new ideas
Community Involvement	Loss of public relations and opportunities for member involvement	Positive public relations which attracts and retains members
Continuity of Leadership	Leadership decline precedes group decline	Increased energy level of leaders energizes entire group
Continuity of Operations	Leaders burdened by day-to-day operations	Leaders can focus on the future
Membership Services	New members are invisible and unmotivated	New members become enthusiastic contributors
Event Planning	Sure decline of group	Create opportunities for involvement and relationship building

Remind participants that this Step is to evaluate the local group as it is now. Exploring solutions and future directions will be covered in Step 3. Remind participants to keep notes of ideas they wish to bring up in the next step.

Lead the group through a discussion of each building block and capture the major ideas on a flipchart. It is important to carefully monitor the time during this Step. Participants can be asked to apply stickers after the discussion of each building block to show which issues they believe need the most attention.

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## 2.3.1 Newsletter and Web Site

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### MAJOR INVESTMENT

Several members are regularly involved in producing the newsletter and Web site, e.g., Webmaster, Editor, Calendar Editor, Publisher and Classified Editor. The number of positions varies with the size of the group, e.g. small groups may have only two or three members involved. Successors have been identified for these positions.

The newsletter and Web site reflect the purpose of the local group and its plan or vision for the future. The local leaders communicate every month with members. Members enthusiastically contribute more puzzles, essays, poetry and art than can be published. Each and every newsletter could be proudly handed to a reporter from the local media as an example of the local Mensa group.

The newsletter and Web site promote national activities that are consistent with the plan or vision of the local group. The group is always in contention for Publications Recognition Program awards.

The local group has a forum for local members on the national Web site and maintains and uses an electronic mailing list.

### SOLID INVESTMENT

The quality of the newsletter and Web site and variety of contributions invite compliments. There are regular columns from a variety of contributors and an active letters column. The calendar is clear, complete and easy to read and encourages contributions. Unsupported opinions are not published as fact, and personal attacks are never published. The newsletter has a positive tone. The Web site is kept up to date and linked to American Mensa and neighboring groups.

The Executive Committee is listed in the newsletter and Web site as well as other contact people. Their contact information is generally up to date.

The local group has a periodical rate mail permit. The newsletter is published regularly and received at the same time each month. The group participates in the PRP program.

### INADEQUATE INVESTMENT

The newsletter generally adheres to deadlines. Occasionally an issue is not published. There are few contributors, and there are no published procedures for submitting articles and no stated editorial policy. Negativity and personal attacks are occasionally printed.

Little information is available regarding whom to contact for more information about local activities. There is no Web site or the site is incomplete or not current. The group does not usually participate in PRP.

## Worksheet: Newsletter and Web site

What is your group's current level of investment in this building block?

Major Investment

Solid Investment

Inadequate Investment

STRENGTHS:	CHALLENGES:

Other comments or insights:

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Satisfied with your current investment level?

yes

no, explain why:

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## 2.3.2 Testing

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### MAJOR INVESTMENT

The Proctor or Testing Coordinator maintains close contact with all Proctors and the local group officers and shares a plan for frequency of tests, rotation, Proctor recruitment and communicating the Mensa image. There are two qualified and active Proctors for each 100 people in the group, representing the geographic areas within the group. Testing sessions always begin with an upbeat information session on Mensa.

Tests are given monthly for smaller groups and more often in larger groups. Culture-free tests are advertised for candidates whose first language is not English or who have learning disabilities such as dyslexia or who choose to take them. Pre-tests are advertised and available as a way to help calm test anxiety. Information is available to parents who want to find moderate cost testing for children. New Proctors are constantly sought and trained.

A strong relationship has been developed with the local media. Publicity regarding testing and activities is published monthly. There is at least one active member responsible for public relations who works closely with the Proctor or Testing Coordinator. The newsletter and Web site continually carry contact information for testing. The National Office is contacted for assistance with major public relations campaigns. The group does special publicity and plans additional testing locations for National Testing Day.

### SOLID INVESTMENT

There is one qualified and active Proctor for each 100 members, representing most geographic areas. Testing occurs six times per year in smaller groups and more often in larger groups at established testing locations. The Proctor or Testing Coordinator is listed in the newsletter and on the Web site. All Proctors use current tests and procedures at every testing session.

Whoever answers the Mensa information telephone works closely with the Proctor or Testing Coordinator to encourage those calling in to attend a testing session or submit prior evidence. The local group aggressively follows up on prospects from the National Office. Occasionally, publicity is mailed out when sessions are scheduled. The group participates in National Testing Day. New Proctors are welcomed when they volunteer.

Proctors encourage potential members to ask questions about Mensa before the test and are knowledgeable about Mensa and the local group.

### INADEQUATE INVESTMENT

Testing occurs several times per year in smaller groups and less than once per month in larger groups. There is one qualified and active Proctor for each 200 members. Candidates generally come from leads provided by the National Office.

There is no publicity outside the local group. There is no information to give on testing children. There is no information provided on the Prior Evidence process as an alternative to testing.

## Worksheet: Testing

What is your group's current level of investment in this building block?

Major Investment

Solid Investment

Inadequate Investment

STRENGTHS:	CHALLENGES:

Other comments or insights:

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Satisfied with your current investment level?

yes

no, explain why:

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## 2.3.3 Community Involvement

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### MAJOR INVESTMENT

Mensa is well known in the community. Noteworthy local members regularly mention Mensa in their interviews with the media. Organizations call to ask Mensa to join in their activities.

There is an active Gifted Children's Coordinator who has close ties with local gifted children's associations. The newsletter carries information about gifted children and there are usually one or more active projects in collaboration with associations that serve gifted children.

The group has at least one active Literacy, Inkslinger or related project in the community. The group regularly participates in activities that draw out members and keep Mensa visible in the community, such as blood drives, public television and radio drives or Odyssey of the Mind judging. Volunteers are provided with Mensa T-shirts or are otherwise highly visible as Mensa members.

There is an active Scholarship Chair who ensures that Mensa scholarships are publicized in the media and through the local gifted associations. Local schools look forward to the annual scholarship and receive information in advance. Ties have been developed with key contact people in the media and the schools. Members understand the scholarship process clearly and encourage friends to apply for scholarships and volunteer to help in the program.

### SOLID INVESTMENT

There is a Scholarship Chair who performs the function and an interested committee to read the scholarship essays. The newsletter carries detailed information on the scholarships. The number of scholarship applicants each year equals about 20 percent of the group's total membership.

There is a Gifted Children's Coordinator who performs the function. The newsletter includes information on gifted children's issues, activities, opportunities and associations.

The group welcomes volunteers for community projects and publishes announcements about them in the newsletter or has speakers from related organizations.

### INADEQUATE INVESTMENT

There is no active Gifted Children's Coordinator and no related activities. There are few family activities on the calendar.

There is no active Scholarship Chairman and no related publicity. The group does not participate in Inkslinger or Literacy projects.

There are no other ties to community programs.

## Worksheet: Community Involvement

What is your group's current level of investment in this building block?

Major Investment

Solid Investment

Inadequate Investment

STRENGTHS:	CHALLENGES:

Other comments or insights:

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Satisfied with your current investment level?

yes

no, explain why:

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## 2.3.4 Continuity of Leadership

### MAJOR INVESTMENT

The local leaders share a purpose and have a plan or vision for the future that is larger than any individual. The written job description for each officer includes responsibilities and goals, both of which are updated annually. Someone has been identified to take over all major tasks when the current officer gives up his or her post. The group buys books, memberships and other materials relevant to officers' duties and helps support officers to attend Leadership Development Workshops. The officers contribute to *InterLoc*.

The Executive Committee meets frequently with at least one member attending for every 100 members in the group. The agenda is circulated in advance, and the meeting minutes are published in the newsletter. There is a high level of trust and teamwork.

The group has a broad cross-section of members, representing diverse geography, age and marital status, in elected and appointed leadership roles. There is a continuous influx of new leaders to eliminate burnout and maintain enthusiasm. The enthusiasm displayed by the active members is infectious.

Disagreeable members are dealt with firmly and directly so their negativity does not affect the entire group. Strict boundaries for their behavior are established, and negative consequences are carried out if necessary. No one "clique" controls any aspect of the group.

### SOLID INVESTMENT

There are some opportunities for new members to become involved. Officers consciously encourage new member involvement and develop leaders for the future. No essential group function is controlled by any single member. All officers receive *InterLoc*. All officers have current handbooks relevant to their functions. Most officers have attended a Leadership Development Workshop during the past year. Officers occasionally go on to regional or national positions.

There are smooth transitions between incoming and outgoing officers; responsibilities are handed off in a thorough and timely way. Elections are run according to the bylaws, and there are usually at least two serious candidates for each position in each election.

### INADEQUATE INVESTMENT

Some of the officers may not be active. The same people serve as officers. New volunteers are recruited only by clever "arm twisting." Generally each officer designs his or her own job. Most officers have not attended a Leadership Development Workshop during the past year.

Serving as an officer is referred to in disparaging terms.

Disagreeable members garner attention and use up much of the group's energy.

Although all officers receive *InterLoc*, they may or may not read it. Ideas from *InterLoc* or pending AMC business are seldom discussed or used at business meetings.

## Worksheet: Continuity of Leadership

What is your group's current level of investment in this building block?

Major Investment

Solid Investment

Inadequate Investment

STRENGTHS:	CHALLENGES:

Other comments or insights:

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Satisfied with your current investment level?

yes

no, explain why:

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## 2.3.5 Continuity of Operations

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### MAJOR INVESTMENT

The budget is updated annually with input from all major officers, and progress against the budget is published according to the required schedule. An independent financial review is undertaken annually or semi-annually. There is a shared sense of accountability and stewardship for the group's resources among the local leaders. The group has sound reimbursement policies with separation of approval and issuing authority, and all officers understand and abide by these policies.

There is a detailed and up-to-date timeline of planning that must take place to carry out local and national events. This timeline is referenced often by members and officers. There is a system in place to easily update and distribute the timeline.

The bylaws are referenced often and kept up to date. The group has Actions Still In Effect or Standing Orders that are up to date. All officers have copies and are familiar with both.

The group has an established method of recognizing volunteers and members are encouraged to earn this recognition.

### SOLID INVESTMENT

Records on financial matters, meeting minutes, bylaws and RG notes are complete and clear. All officer and address changes are reported promptly to National Office. Officers are thanked for their service often.

The financial report is published at least twice a year and the Executive Committee practices sound financial management. There are strict controls and procedures for approving expenditures and issuing checks, especially for RGs and other large events.

The group communicates with the RVC regularly and provides feedback on problems and upcoming AMC agenda items.

The Treasurer tracks all payments into the group and ensures that the local group receives all payments due. The Treasurer prepares a budget and sends the Form 1099 to the National Office.

### INADEQUATE INVESTMENT

Planning is done by the seat of the pants for events and finances. Few records are kept. The annual financial review is given lip service. Only one officer keeps all the group's financial records and can give out money with no checks or balances. The group does not worry about liability, risk or insurance.

## Worksheet: Continuity of Operations

What is your group's current level of investment in this building block?

Major Investment

Solid Investment

Inadequate Investment

STRENGTHS:	CHALLENGES:

Other comments or insights:

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Satisfied with your current investment level?

yes

no, explain why:

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## 2.3.6 Membership Services

### MAJOR INVESTMENT

The Membership Officer and committee contact prospective members and encourage them to attend an event. They may offer ride-sharing or assistance getting to and from the events, for both prospective and new members. New members are offered discounts or other incentives to encourage them to attend events. The Membership Officer uses volunteers to assist in making contact with each member every year prior to renewal and feedback from those phone calls is shared with the Executive Committee. Local Area Coordinators are active in welcoming members in their areas.

Events are regularly scheduled just for new members, and someone personally encourages each new member to attend. The group makes an effort to support regional events and collaborate on shared events with neighboring groups. Calendar highlights are shared with nearby groups. Opportunities for not-in-person participation, e.g., bulletin boards, forums, writing for the newsletter, are also promoted. Members' questions are answered quickly and helpfully.

The officers make an effort to provide opportunities for new volunteers to become more involved in group activities and encourage new members to accept leadership roles. All new members receive a questionnaire and are asked to do at least one specific volunteer job during their first year of membership.

### SOLID INVESTMENT

The Membership Officer provides written information, such as a new member's handbook, or a personal phone call to each new member. The contact includes information about events and encourages participation both as a consumer and as a volunteer.

The newsletter and Web site always give complete names and explain local Mensa jargon. Adequate directions and maps are provided for all events. Members are invited to sponsor calendar events and new events and hosts are added from time to time. Volunteer opportunities are advertised via the newsletter and one quarter of the group's workers are new each year.

The group participates in the Group of the Year Program and encourages participation in national events such as Culture Quest, the Annual Gathering and nearby RGs. The group has a SIGHT Coordinator and local members know about the program. The group is paired with one or more groups from other countries through Mensa WorldConnect.

Members are offered incentives, such as reduced fees, to attend Mensa events. Lapsed members receive letters or phone calls to encourage them to renew.

### INADEQUATE INVESTMENT

There is no Membership Officer or the Membership Officer responds to inquiries only. New and lapsed members receive no special communication from the local group. Correspondence to new and lapsed members is poorly written, negative or outdated.

## Worksheet: Membership Services

What is your group's current level of investment in this building block?

Major Investment

Solid Investment

Inadequate Investment

STRENGTHS:	CHALLENGES:

Other comments or insights:

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Satisfied with your current investment level?

yes

no, explain why:

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## 2.3.7 Event Planning

### MAJOR INVESTMENT

The group, if large enough, holds a well-attended RG every year. The planning committee includes a mix of veteran planners and new members. The RG and other major events have a system to ensure continuity, pass knowledge along and build on the success of previous events.

Most activities are well-attended. There is a roster of regular events that serve a wide variety of members including singles, GenXers and families. The group calendar of events always contains encouragement and information on how any member can initiate new activities. New events pop up at least once a month in larger groups, and every two to three months in smaller groups. Some of the new events become regular events. Responsibility for hosting the events rotates between members.

All cities of 100,000 people or more than one hour apart in the group's geographic area have monthly events. All cities of 50,000 have at least quarterly events.

### SOLID INVESTMENT

The group leverages local activities from national opportunities such as CultureQuest, Inkslinger and Literacy. The group fields at least one CultureQuest team per 250 members.

There is a plan in place for a regular theme event, e.g., an RG, dinner or campout, with leadership assigned and progress and publicity one year in advance. Other theme events are planned when someone is willing to lead them. The group has a local contract professional

or has the National Office review contracts before signing them.

There is a generous roster of well-attended, regular activities listed in the newsletter and Web site. Each activity has an assigned host listed in the newsletter and Web site and someone provides information about customary dress and other information helpful to new or inactive members. New types of events, locations and hosts appear regularly. Events specify if smoking, alcohol or allergens will be present. Events in public venues make it easy for new or inactive members to locate the group.

The events are designed to reach all members both geographically and demographically, e.g., price, families, physically challenged, singles, members without transportation.

### INADEQUATE INVESTMENT

There are an inadequate number of activities, depending on the size and geography of the group. Attendance is sporadic. A few people plan most of the activities.

Only officers plan and sponsor events.

Event information is hard for new members to understand or find. Frequent "in group" references in the newsletter or Web site put off members who are not currently active. No activities appear that are clearly indicated as appropriate for families with children.

No activities or events held outside the main hub city.

## Worksheet: Event Planning

What is your group's current level of investment in this building block?

Major Investment

Solid Investment

Inadequate Investment

STRENGTHS:	CHALLENGES:

Other comments or insights:

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Satisfied with your current investment level?

yes

no, explain why:

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## 2.4 STEP 3: GOAL SETTING

Tell the participants: We are now at the final and most important Step in this process. Now we will synthesize the work you have done in order to launch focused, manageable, improvement efforts. If we do a good job in this Step, your work today will translate into meaningful change for your local group.

A. List the group's major strengths and discuss ways to enhance these:

Strengths:	Ways to Enhance:

B. List the group's major weaknesses and how they can be improved:

Challenges:	Ways to Address/Improve:

C. Develop a set of major goals

- Decide if the goals will be for one, two or five years. (One-year goals are the most useful.)
- List the goals on a flipchart. Keep them simple. For example:
  1. Attract locals and new members to quarterly meetings
  2. Increase the activity of Local Area Coordinators
  3. Recruit a Gen-X SIG Coordinator
- Narrow the goals down to the most important ones using stickers. Give each participant three stickers to attach to one or more goals. Ask them to try to represent the whole group, including constituencies not represented, as they do this.
- Decide on the top three to five goals and rewrite them. While doing so, ask participants to think about how these can be implemented. Take down the other flipcharts and display the goals for all to see.

GOALS FOR OUR LOCAL GROUP FOR NEXT \_\_ YEARS

- 1.
- 2.
- 3.
- 4.
- 5.

- Ask participants to write their name on 1-3 dots and place these next to the goal(s) that they, personally, agree to work on in the next year.

D. Start a flipchart to record who is willing to do what to implement each goal.

Goal #	Planned Actions:	By Whom:	By When:

E. Add to the flipchart the basic actions that need to be followed up and build on the work done today. (Participants will be anxious to leave or eat, but skipping this last section can make the difference between a plan that gathers dust and one that gets done.)

- Decide who will record and publish the major flipchart points and by when.
- Decide who will synopsise the retreat for the next issue of the newsletter.
- Determine which key members are not present and decide who will brief them on the retreat and encourage them to join the process.
- Identify leaders for any major goal area that had no personal volunteers.
- Decide who will be responsible for the periodic review of the overall process during the year and note the dates when the review will place.

F. Discuss what went well and what did not for the retreat. Congratulate the group on a job well done!

G. Go back over the items in D and E and ensure they are not forgotten.

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