



Forum Retreats- Tips and Tricks

Forum Moderator Webinar Series



WELCOME TO TODAY'S PRESENTER



ANNA BIRCH
EO DC Member

- **EO Forum Trainer**
- **Forum Retreat Facilitator and Lead Forum Director- current**
- **Past Forum Director**
- **Past Chapter President**
- **Past Forum Chair**



This webinar is being recorded for future educational use.

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Today's Agenda

- Retreat Planning - tips for success
- To hire or not to hire...
- Review of EO resources and tools
- Q&A (Please submit your questions using the Q & A tab at the top of your screen. We will answer them at the end of the presentation.)
- Closing



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Retreat Planning

- Start with the end in mind
- Set clear forum retreat goals
- Conduct Forum health survey prior to retreat

<https://eoaccess.eonetowork.org/DC/MyEO/resources/pages/Forum-Health-Survey.aspx>

**All URL addresses will appear in the handout materials
in our follow-up email.**



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Retreat Planning - Continued

Forum retreats are a critical blend of

- Forum work
- Fun/adventurous or
Once in a Lifetime activities and
- Social time



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Markers of Great Retreats

- Acceleration of depth and intimacy within Forum in a fun, lively, and interactive atmosphere. Or - new member integration.
- Taking the opportunity to address and resolve concerns or conflicts.
- The ability to integrate new Forum processes or practices to increase the overall value of Forum.
- The integration of a key topic, accountability, or key focus for the Forum.



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Quick Tips

- Forum retreat approvals: cover in Forum constitution
- Retreat planner does not have to be Moderator
- Retreat budget
- Forum's wishes for travel: i.e. only non-stop, distance from home, desire for in or out of country, etc...
- Lodging best practices
- Set dates and plans WELL in advance
- Duration: minimum of 3 days
- The magic mix: learning, Forum work, and social



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To Hire or Not to Hire

PROS

- External voice to address blind spots and ways to increase value that Forum has not seen
- Professional delivery and fresh ideas
- Assistance in reviewing health survey
- Ability for retreat planner to focus on fun, social, adventurous planning

CONS

- Added costs and logistics
- Potential 'setback' of openness
- Potential for non EO'er to not "get it"



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Resources to Plan Great Retreats

Other Chapters

- Chapter Admin
- Local Learning events
- Member connections
- Super Forum

EO Website www.eoaccess.org

- Retreat Planning Guide

<https://eoaccess.eonetwork.org/DC/MyEO/resources/pages/Forum-Retreat-Planning-Resources.aspx>



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Resources - Continued

Retreat Locations Database

<https://eoaccess.eonetwork.org/DC/MyEO/resources/pages/Forum-Retreat-Planning-Resources.aspx>

Member-to-Member Exchange

Speakers and Facilitators Database



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**Do you have any
unanswered questions?**

**Click on the Q&A tab at the top of your
screen to submit your questions.**



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Need to reach out to us?

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Thank you for joining us today!

We hope you will use the information from this presentation in your role as Forum Moderator.



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