



## **Evolutionary Retreats**

### Sample Day Flow

#### *Sample 1*

##### **Key Objectives:**

- 1) One year strategic plan
- 2) Three month tactical plan
- 3) Map of widely discussed and hidden internal issues that might threaten organization's success
- 4) List of collectively generated guidelines to facilitate productive communication
- 5) Visualized informal connections within the team that are crucial for operational effectiveness

##### **Day Flow:**

##### **1. Opening (60 min)**

- CEO states the purpose of the retreat, sets the context, and names key deliverables. (Speech)
- Check-In: What does success of this retreat look like for you? (Circle)
- What do you need to freely contribute with your perspective? What do you need to be able to listen deeply? (Large group work)

##### **2. Why are we great? (60 min)**

- Individual reflections
- Presentations in groups of 4
- Selection of 3 ideas per small group
- Large group work: clustering and pattern identification

##### **Break (5 min)**

##### **3. How can we build on our success and what might keep us from doing that? (60 min)**

- What goals should we focus on in the next year? What the customers, organization, and team members can achieve as a result? (Large group work)
- What are the risks that might keep us from getting there? Draw the elephant! (Individual work, anonymized)

##### **Lunch (60 min)**

##### **4. What is our strategy? (75 min)**

- What strategy would maximize our chances to achieve our goals given what we have learned from the "elephant"? What are the other environmental factors, threats, and opportunities – internal & external? How do they influence our strategy?
  - Discussion in groups of 4



# Institute for Evolutionary Leadership

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*Leadership for a more just, sustainable, and flourishing world*

- Small group presentations
- Summary by CEO
- Large group discussion & forging of shared commitment

**Break** (5 min)

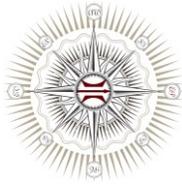
## **5. What are immediate action steps?** (75 min)

- What should we focus on in the next 3 months? What needs to be done and what needs to be delivered?
  - Large group work
  - Individual reflection
  - Individual presentations
  - Large group discussion
- How you go about this – quality of interactions, relationships, etc.? What are the desirable byproducts of the process or way it is done? (Large group work)

## **6. Let's do it together!** (30 min)

- Identify people on the team whose active support is critical for the success of your specific tasks in the next 3 months. Let them know you need them, and be ready to support others! (Individual and large group work)

**Check-out:** What are you taking away from this retreat? (Circle)



## **Evolutionary Retreats**

### Sample Day Flow

#### *Sample 1*

##### **Key Objectives:**

- 1) Align team with the highest purpose of the organization
- 2) Build solid interpersonal foundation for team cohesiveness and effective collaboration
- 3) SWOT analysis and groundwork for strategy formation
- 4) Identify requirements for effective leadership transition

##### **Day Flow:**

###### **Opening (15 min)**

Founder introduces the purpose of this retreat.  
Facilitator introduces key principles and day flow.

###### **Focus on Relationships (60 min)**

*Circle:* Check in: What is [Org Name] for you? Why did you choose to join the team? If today's retreat is a great success, how that would look like for you? (Participants go first, Founder goes last responding to a slightly modified question: "Why did you decide to start [Org Name]")

*Pairs (three rounds):* If you really, deeply knew me, you would... (finish the sentence as many times as you want within 3 min)

*Large group:* Debrief

*Pairs (three rounds):* Non-verbal coordination exercise (with ping pong balls)

*Large group:* Debrief

###### **BREAK (10 min)**

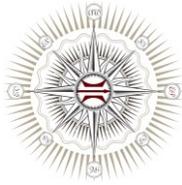
###### **Focus on Purpose (25 min)**

*Individual journaling:* generate three suggestions of how we might frame the purpose of [Org Name].

*Large group:* Sharing suggestions, clustering suggestions the wall, guided dialogue to converge on a shared framing of the purpose.

###### **Focus on Context (40 min)**

*Large group:* Mapping key external and internal stakeholders using the Five Areas Model: Area of Purpose (core team), Area of Action (those acting on behalf of the organization), Area of Interactions (those with whom



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organization representatives interact directly), Area of Impact (those whose lives are impacted by the organization), and Area of Context (those who set social context for organization's activities and impact).

## **LUNCH BREAK (12:30 to 1:30 pm)**

### **Focus on Vision (30 min)**

Large group: Post its on the wall: What are [Org Name] strengths and opportunities? Based on those strengths and opportunities, what would be the vision that comes from the highest possibility?

### **Focus on Obstacles & Needs (30 min)**

Large group mixed with short periods of individual reflections: What can stand on the way of that vision? What threats, weaknesses, or special needs should be addressed?

### **Focus on Strategy (50 min)**

Pairs: How can we strategically address threats, weaknesses, and special needs so that we could build on our strengths and pursue opportunities to get closer to our highest vision?

Large group: Sharing key findings

## **BREAK (10 min)**

### **Focus on Action Plan (40 min)**

Pairs: What are the actions we need to take in the coming six months make sure that we are on the right track? (special emphasis on support needed from the Founder)

Large group: Sharing key findings and finalizing the plan

### **Focus on Personal Commitments (40 min)**

Individual journaling: What does this mean to me? What should I personally do to make this happen, and what support I need from my fellow core team members to contribute in the best possible way?

Large group: Sharing insights and requests for support

### **Closing (10 min)**

Closing circle: How do you feel about moving forward? Any closing remarks you feel called to make?