**Minimum Guidelines**

*MPI Approved Guidelines as of February 9, 2016*

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**INTRODUCTION**

These minimum guidelines were created by Meeting Professionals International to provide an outline of the minimum acceptable standards for anyone who will be facilitating MPI Chapter Board retreats *(both Annual & Mid-Year)*. The ultimate goal is for facilitators to have a comprehensive understanding of and be well versed in MPI’s overall objectives for its Chapters *(and for the global brand)*; and to have access to effective facilitation skill builders and additional resources. These minimum guidelines may be “added to” which will allow for a facilitator’s unique presentation style - *but reflect the minimum standards all Chapter retreat facilitators must adhere to.*

**PRIMARY PURPOSE**

The primary purpose of an MPI Chapter Board retreat is to develop a clear, concise and attainable roadmap for a fiscal year, which will provide clarity on not only “what” a Chapter Board of Directors will do to achieve their goals, but “how” they will execute them. As a result of the retreat work-product, Chapter leaders should always be able to answer YES to the question, *“Are we meeting the needs of our membership?”*

**MPI FACILITATOR JOB DESCRIPTION**

**WHAT IS A FACILITATOR?**

A facilitator is an individual who enables groups and organizations to work more effectively; to collaborate and achieve synergy. They are a 'content neutral' party who by not taking sides or expressing or advocating a point of view during the meeting, can advocate for fair, open, and inclusive procedures to accomplish the group's work. They are the one who contributes structure and process to interactions so groups are able to function effectively and make high-quality decisions. They are a helper and enabler whose goal is to support others as they achieve exceptional performance. The MPI chapter board retreat facilitator's job is to support everyone to do their best thinking. To do this, the facilitator encourages full participation, promotes mutual understanding, and cultivates shared responsibility. By supporting everyone to do their best thinking, a facilitator enables group members to search for inclusive solutions and build sustainable agreements.

*Definition Provided by the International Association of Facilitators*

**Education and Experience**

MPI Chapter Board Retreat facilitators should have significant experience in organizational leadership roles and/or project management; have held a leadership position within an MPI Chapter, preferably that of President; and, be current members of MPI in good standing.

**Skills**

Understanding of and/or proficiency in the following areas:

* Governance, including Bylaws, Policies and Procedures, and Robert’s Rules of Order
* Chapter Leadership Experience
* Communication Skills
* Presentation, Training and Facilitation Skills
* Financial Management Expertise
* Business Plan Development
* Conflict Resolution
* Supportive of MPI

Facilitators will be working with the Office of the President (primarily the President-Elect for the annual retreat and President --- and to some extent the President-Elect --- for the mid-year) to understand the desired outcome(s), which need to be consistent with MPI Guidelines.

The primary responsibility is then to:

* Design and plan the group process in conjunction with the Chapter Leadership, and recommend the tools that best help the board members progress towards that outcome.
* Guide and control the retreat to ensure that:
	+ There is effective participation.
	+ Board members achieve a mutual understanding of goals, objectives, and their individual and collective roles in the success of the chapter.
	+ Their contributions are considered and included in the ideas, solutions, or decisions that

emerge.

* Participants take shared responsibility for the outcome.
* Ensure that outcomes, actions, and questions are properly recorded and actioned, and appropriately dealt with afterwards.

**Duties**

Facilitators must serve as professional role models, be able to lead discussions effectively, and talk about potentially difficult issues in a professional manner. Additionally, they must be proficient in training or teaching others and being their guide through leadership or group bonding activities. The facilitator is responsible for initiating the first retreat planning call in order to discuss retreat format and presentations, preparing agenda, retreat set-up, logistics – travel, accommodations, transportation, etc.). The facilitator is responsible for the post retreat evaluation form and completing the facilitator report form.

**Work Commitment**

MPI chapter board annual retreats are generally two full days and are held April through June. Mid-year retreats are usually 1½ days held November through January.

**Annual Chapter Board Retreat Minimum Guidelines**

The following represents minimum recommendations for successful MPI Chapter leadership retreats. While this list references an ideal situation, it is important that facilitators have flexibility when working with the Chapters and can add to this process when necessary. A facilitator’s role is to guide conversations – *not teach*. They are a 'content neutral' party who by not taking sides or expressing or advocating a point of view during the meeting, can advocate for fair, open, and inclusive procedures to accomplish the group's work.

**OVERVIEW - PHILOSOPHICAL VIEW**

1. Utilize the Recommended Retreat Agenda **(See Pages 17-19)**
2. Work with the CBM (whether in attendance or not) in advance of the retreat to prepare for the needs of the chapter. Gather data as needed from the CBM and discuss items, which should be covered including the chapter strengths, weaknesses, and opportunities.
3. Collaborate with the Chapter President, CBM, and Facilitator in developing the agenda --- identifying who is responsible for what in developing the agenda.
4. Understand who and what the MPI customer base is and how that translates into the chapter goals.
5. Have a clear understanding of the MPI Chapter and Global website (must be able to direct questions to the appropriate locations on the Chapter Leader Resource Page - CLRP)
6. Keep retreats more strategic (high level) than tactical. Understand the difference of what should be done at committee levels and what is board discussion.
7. Utilize team building activities and/or exercises when appropriate to reinforce the retreat agenda goals.

**GOALS (OBJECTIVES) – DEVELOPING THE CHAPTER’S ROADMAP**

1. Work with the chapter leadership team regarding expectations and properly identifying chapter objectives.
2. Develop and distribute a brief pre-retreat survey to the board to gain information for the agenda and to identify expectations.
3. Reinforce with the board members that the chapter operates as a business and emphasize the roles that they play in that process.
4. Review Chapter Reporting criteria.
5. Make certain that the agenda and any retreat activities ensure that the chapter leaves the retreat with a Business Plan, Budget, 18-Month Calendar, MarCom Calendar, and written Succession Plan (should be well underway as part of transition prior to annual retreat and finalized at retreat).
6. Provide the CBM and Chapter a standardized post retreat follow-up report on actions put into place during retreat.

**TASKS (ACTION ITEMS) - HOW TO ACCOMPLISH THE OBJECTIVES**

1. Address leadership challenges such as accountability and how to manage volunteers, conflict management, and managing the expectations of the membership.
2. Discuss chapter demographics and how they play a role in developing the chapter budget, education plan, and business plan.
3. Cover metrics --- what they are, why we have them and how to utilize them, as well as dashboard implementation (in the event the CBM is not in attendance).
4. Each team/department will do a presentation regarding their team goals, successes and challenges as well as their individual membership growth and engagement projects and what they need from other board members to be successful.
5. Assess all programs of the Chapter to determine what stays, what goes and what can merge together to streamline the Chapter activities.

**TIMELINE**

Ideally the retreat dates for both the annual and mid-year retreats should be set during the preceding year and the same facilitator is chosen for both retreats in the fiscal year. **Suggested pattern for Annual Retreat:** April-June *[This timeline mirrors the PE Responsibility Timeline Provided to PE’s by MPI]*

|  |  |  |
| --- | --- | --- |
| **When?** | **Person(s) Responsible** | **Action** |
| **October** | President-Elect (*sitting)* | Format and send Annual Retreat RFP  |
| **Mid November-Mid January** | President-Elect (*sitting)* | Interview and secure Annual Retreat Facilitator.  NOTE: Include your CBM in this process  |
| **February** | President-Elect (*sitting)* | * Annual Retreat Review with CBM
* Confirm Annual Retreat Dates & location w/candidates during interview process)
* Work with facilitator on Annual Retreat Agenda
* Finalize Facilitator Annual Retreat Agreement
 |
| **March** | President-Elect (*sitting)* | * Continue Retreat Facilitator agenda calls
* Finalize initial retreat agenda
* Immediately after the next year’s board is approved and notified the PE, with coaching from the facilitator:
1. Sends a welcome email to the new board. This email will include all the details of the retreat, such as the name of the facilitator, location, times, agenda template, standard objectives, and outcomes. Each team will also understand that they will be receiving their pre-retreat assignments at least 4 weeks prior to the

retreat.1. Sends an email to each department of the outgoing and incoming boards (membership, education, communications, finance, office of the President) emails (suggested template is included in the Documents for Retreat). The purpose of this email is to create an opportunity for the outgoing board and the incoming board members from each department to get together, discuss what worked in the past year, what didn’t, and based on that, where do they need to focus moving forward.
2. The Transition Meeting creates a chance for healthy transition of board members allowing the experienced board member to assist the newer board members in building the best goals for the department and most importantly, creates ownership for the board members in setting their goals, coming to the retreat prepared and fully briefed for their new area.
 |
| **4 Weeks Prior to Retreat** | President-Elect (*sitting)* (with guidance from the Facilitator) | The pre-arrival agenda and pre-work is sent out. |
| **1 Week Prior to Retreat** | Appropriate Board Members | 1. All team presentations are to be turned into the PE, Chapter Administrator and/or the Facilitator in preparation for the retreat.
2. Whoever is in-charge of the business plan (Chapter Administrator or VP of Administration) will pre-populate the business plan with the goals from the presentation slides that have been received prior to the retreat.
 |
| **1 Day After Retreat** | Chapter Administrator (or appropriate Board member) | Distribute post retreat evaluation to each retreat attendee. Compilation of results to be distributed to the Board, CBM and Facilitator. |
| **7 Days After Retreat** | Chapter Administrator (or appropriate Board Member) | All/any changes are made to the business plan and sent to the team for final review and for them to fill in their action plans as needed. |
| **10 Days After Retreat** | Facilitator | Provide the CBM and Chapter the standardized Post Retreat Report on actions put into place during retreat. |
| **June 15** | President-Elect (*sitting)* | Submit all finalized business documents (Business Plan, Budget, 18-Month Calendar, Succession Plan, MarCom Plan/Calendar, updated Bylaws and Policy Manual) to CBM |

**RETREAT AGENDA DEVELOPMENT - Determining the Retreat Objectives with the CBM and the Chapter President**

*Determining Chapter Specific Goals & Objectives:*

* What are the biggest priorities for the coming year and do they align with the overall MPI goals?
* What has been missed at previous retreats or what might have been done?
* What causes the chapter and/or the chapter leadership pain right now?

*Executing Goals & Objectives from MPI Global:*

* In order to execute the goals and objectives of MPI, the facilitator must fully understand them. The CBM and chapter retreat facilitator are the chapter partners in helping the board to understand these and succeed. If you have questions, ask the chapter’s CBM for clarification during the pre-retreat calls.

 *Setting the Tone for the Year:*

* The future of Chapter leadership is all about having a clear vision for the future, effectively communicating that vision, and ensuring that the chapter leaders have the tools they need to be successful.

**SUGGESTED PROCESSES**

1. *Transition Process:* The outgoing board member should be including the incoming board member in the end of the year committee meeting(s); discussing the projected goals with the committee; and, building a draft of action items for moving forward. The teams are then able to start immediately after the retreat

with only minor adjustments as determined by the board during the retreat.

1. *Initial Planning Meetings:* These meetings should consist of reviewing the budget, determining how they did from the previous term, and deciding what adjustments they are requesting in the

new budget moving forward for budget discussions at the retreat. The adjusted budget requests are submitted with the presentation enabling the Administrator or VP of Finance to have the draft

budget ready for review at the retreat. The outgoing Board will approve the budget for the following year.

1. *Business Plan Development:* A Chapter Business Plan template can be found on the CLRP.
2. *Team Presentations:* Cover updates as needed for Business Planning and Budgeting (should be able to advise and assist with sponsorship brainstorming if needed). Having the individual teams stand in front of their peers and give a presentation brings ownership and accountability to the board. It sets a tone of the expectations for the year. It will also elevate most chapters to a more strategic board retreat. Rather than the board working out every detail of the business plan, it puts the committees back in charge of what they do best with oversight of the chapter business. This will also free the retreat up for more training needed such as future succession planning, leadership training, board structure and long term planning needs, team building. Allow approximately 20-30 minutes for each team presentation including 10 minutes for Q&A. The board can ask questions, discuss the goals, and make changes as necessary. The team’s goals are then completed with adjustments being made to action items. The next step post-retreat is to present the plan to their committees for implementation.
3. *Additional:* The remainder of the retreat schedule should be collaboratively discussed between the PE, Facilitator, CBM, and the new incoming PE to determine additional training elements or team

building that will best suit the board at that time. It is important for the PE to put a required deadline on expected action items and hold their teams accountable to having the pre-work submitted in advance of the retreat.

**DOCUMENTS FOR RETREAT: REVIEW, DEVELOP, COMPLETE** *(contact CBM for documents)*

|  |  |  |  |
| --- | --- | --- | --- |
| Transition Process | Business Plan | Budget | Dashboard Metrics  |
| Chapter Needs Assessment  | MarCom Calendar/Plan | 18-Month Education Plan | Written Succession Plan |
| Nomination Instructions | Internal Chapter Slate | Membership Plan |  |

**Mid-Year Chapter Board Retreat Minimum Guidelines**

The following represents minimum recommendations for successful MPI chapter mid-year leadership retreats. While this list references an ideal situation, it is important that facilitators have flexibility when working with the chapters and can add to this process when necessary. A facilitator’s role is to guide conversations – not teach. They are a 'content neutral' party who by not taking sides or expressing or advocating a point of view during the meeting, can advocate for fair, open, and inclusive procedures to accomplish the group's work.

**OVERVIEW - PHILOSOPHICAL VIEW**

1. Utilize the Recommended Mid-Year Retreat Agenda. **(See Pages 17-19)**
2. Work with the CBM (whether in attendance or not) in advance of the retreat to prepare for the needs of the chapter. Gather data as needed from CBM and discuss items, which should be covered including the chapter strengths, weaknesses, and opportunities.
3. Continue to reinforce the understanding of who and what the MPI customer base is and how that translates into the chapter goals. Have a clear understanding of the MPI Chapter and Global website (must be able to direct questions to the appropriate locations on the Chapter Leader Resource Page - CLRP)
4. Continue to keep retreats more strategic (high level) than tactical. Understand the difference of what should be done at committee levels and what is board discussion.
5. Utilize team building activities and/or exercises when appropriate to reinforce the retreat agenda goals.

**GOALS (OBJECTIVES) – CONTINUING THE DEPLOYMENT OF THE CHAPTER ROADMAP**

1. Work with the chapter leadership team regarding expectations and properly identifying chapter objectives for the remainder of the year.
2. Develop and distribute a brief pre-retreat survey to the board to gain information for the agenda and to identify expectations.
3. Reinforce with the board members that the chapter operates as a business and the roles that they play in that process.
4. Review the Chapter Business Plan to see where a chapter stands YTD, what needs to be completed for the remainder of the year, and how that relates to current chapter metrics.
5. Review of “present” time, what’s working well, what is the current energy level of the chapter.
6. Utilizing the Skills Matrix as the model, perform Succession Training based on MPI model (in the event the CBM is not in attendance).
7. Have a clear understanding of the MPI Chapter and Global website and be able to direct questions to appropriate locations.
8. Provide the CBM and Chapter a standardized follow up report on actions put into place during retreat.

**TASKS (ACTION ITEMS) - HOW WE ARE GOING TO ACCOMPLISH OUR OBJECTIVES**

1. Each team/department will do a presentation regarding their team goals, successes and, challenges as well as their individual membership growth and engagement projects and what they need from other board members to continue to be successful.
2. Assess all programs of the Chapter to determine what stays, what goes and what can merge together to streamline the Chapter activities.
3. Review/brainstorm of what is possible in the chapter for the remainder of the year and how it relates to the chapter metrics.
4. Conduct a financial forecast process to project year-end revenues and expenses.
5. Address leadership challenges such as accountability, how to manage volunteers, conflict management, and managing the expectations of the membership.

**TIMELINE**

Ideally the retreat dates for both the annual and mid-year retreats should be set during the preceding year and the same facilitator is chosen for both retreats in the fiscal year. Encouraging the chapters to choose dates that are consistent year-to-year (e.g.: the 3rd proactive in their ongoing planning efforts (including recruitment, etc.). **Suggested pattern for Mid-Year Retreat:** November-January *[This timeline mirrors the President’s Responsibility Timeline Provided to President’s by MPI]*

|  |  |  |
| --- | --- | --- |
| **When?** | **Person(s) Responsible** | **Action** |
| **July** | President (*sitting)* | * Format and send RFP for Mid‐Year Retreats. (NOTE: Held Mid‐November thru Mid-January)
* It is ideal to carry facilitators through a full calendar year for consistency
* Also consider graduating facilitators after a number of years
 |
| **August** | President (*sitting)* | * Secure Mid-Year Retreat dates & Facilitator
* Finalize Mid-Year Retreat Facilitator Agreement
 |
| **September** | President (*sitting)* | * Mid-Year Retreat Agenda Call with Facilitator & CBM (September – October)
* Finalize Mid-Year Retreat location details and dates
 |
| **October** | President (*sitting)*, President-Elect (*sitting)*, Chapter Admin, CBM | * Mid-Year Retreat Agenda call with Facilitator & CBM (September – October)
 |
| **Mid-November – Mid January** | President (*sitting)* | * Mid-Year Retreats take place
 |
| **2 Months Prior to the Retreat** | President (*sitting)*, President (*sitting)* & Facilitator | * The facilitator is chosen and the initial conference call takes place with the PE, current President, CBM & facilitator. The facilitator is then included in all communication specific to the retreat.
 |
| **4 Weeks Prior to Retreat** | President (*sitting)* (with guidance from the Facilitator) | * The pre-arrival agenda and pre-work is sent out.
 |
| **1 Week Prior to Retreat** | Appropriate Board Members | * All team presentations are to be turned into the President-Elect, Chapter Administrator and/or the Facilitator (as directed) in preparation for the retreat.
 |
| **1 Week Prior to Retreat** | Chapter Admin, VP Admin (or appropriate Board Member) | * Whoever is in-charge of the Business Plan *(Chapter Admin or VP of Administration)* will pre-populate the proposed **updates** to the business plan with the goals from the presentation slide that have been received prior to the retreat.
 |
|  |  |  |
| **1 Day After Retreat** | Chapter Admin (or appropriate Board member) | * Distribute post retreat evaluation to each retreat attendee. Compilation of results needs to be distributed to the Board, CBM and Facilitator.
 |
| **7 Days After Retreat** | President (*sitting)* (Or Chapter Admin) | * All/any changes are made to the business plan and it is sent out to the team for final review and for them to fill in their action plans as needed.
 |
| **10 Days After Retreat** | Facilitator | * Complete the standardized online Post Retreat Facilitator Report.
 |

**RETREAT AGENDA DEVELOPMENT - Determining the Retreat Objectives with the CBM and the Chapter President**

*Determining Chapter Specific Goals & Objectives:*

* What are the biggest priorities for the remainder of the year and transitioning into next year?
* What has been missed at the annual retreat that can be covered during the mid-year retreat?
* What causes the chapter and/or the chapter leadership pain right now?

*Executing Goals & Objectives from MPI Global:*

* In order to execute the goals and objectives of MPI the facilitator needs to fully understand them. The CBM and chapter retreat facilitator are the chapter partners in helping the board to understand these and succeed. If you have questions, ask the chapter’s CBM for clarification before the retreat.

**SUGGESTED PROCESSES**

* *Team Presentations:* The mid-year retreat Team Presentations should include a trailing view of the first half of the fiscal year, proposed updates to the Business Plan for each team, and the beginning of Transition Planning for each team. Cover updates as needed for Business Planning and Budgeting (should be able to advise and assist with sponsorship brainstorming if needed). Having the individual teams stand in front of their peers and give a presentation continues to reinforce their ownership and accountability to the board. It sets a tone of the expectations for the remainder of the year.

It will also elevate most chapters to a more strategic board retreat. Rather than the board working out every detail of the business plan it puts the committees back in charge of what they do best with oversight of the chapter business. This will also free the retreat up for more training needed such as future succession planning, leadership training, board structure and long term planning needs, team building. After each presentation you should allow for approximately 10 minutes for discussion. The board can ask questions, discuss the goals, and make changes as necessary.

The team’s goals are then completed with adjustments being made to action items. The next step post-retreat is to present the plan to their committees for the necessary adjustments to their remainder of the year plan and implementation.

* *Succession and Transition Planning:* Discussions should be taking place regarding both processes including finalizing a formal Transition Plan process for all teams the collective board.
* *Additional:* The remainder of the retreat schedule should be collaboratively discussed between the PE, Facilitator, CBM, and the new incoming PE to determine additional training elements or team building that will best suit the board at that time. It is important for the PE to put a required deadline on expected action items and hold their teams accountable to having them pre-done in advance of the retreat.

**DOCUMENTS FOR RETREAT: REVIEW, DEVELOP, COMPLETE** *(contact CBM for documents)*

|  |  |  |  |
| --- | --- | --- | --- |
| Transition Process | Business Plan | Budget | Dashboard Metrics  |
| Chapter Needs Assessment  | MarCom Calendar/Plan | 18-Month Education Plan | Written Succession Plan  |
| Nomination Instructions | Internal Chapter Slate  | Chapter Slate Template- |  |

**Suggested Annual & Mid-Year Retreat Agenda**

|  |  |  |
| --- | --- | --- |
| **Date** | **Program Details** | **Comments** |
|  | **Retreat Opening*** Welcome
* Introductions
 | * President
* President & Host Venue
 |
|  | **Expectations of Attendees*** Insert on Agenda & Review with attendees Retreat Objectives set by President & CBM
 | Facilitator |
|  | **Agenda Review** | Facilitator |
|  | **Team Building Activity** *(Optional)* | Facilitator |
|  | **Updates from MPI*** Requirements to be an MPI Chapter
* Review of Previous Year Metrics
* Results of MPI (Chapter Specific) Survey
* Finalize Upcoming Dashboard Metrics
* Reminder that Metrics should be discussed at every board meeting
 | CBM |
|  | **Team Presentations** *(Overview, Strategy and Tactics)*1. **Leadership Team** Presentation
	1. Succession Planning
	2. Committee Recruitment
2. **Education Team** Presentation
	1. Education Plan/Calendar
	2. Event Marketing Strategies
3. **Membership Team** Presentation
	1. Member Recruitment Plan
	2. Member Retention Plan
	3. Member Recognition Plan
	4. New Member On Boarding Plan
4. **Communication Team** Presentation
	1. Marketing & PR Plan
5. **Financial Team** Presentation
	1. Budget Overview (Adherence & Resources)
	2. Slide to demonstrate how finance affects the department/Chapter and what motions to present at the next board meeting, if any)
 |  |
|  | **Final Review, Revision and Finalization of Business Plan and Budget** | Facilitator |
|  | **Chapter Specific Discussions:*** Mid-Year Retreat Pre-Planning *(@ Annual)*
* Succession Planning *(@ Mid-Year)*
* Nomination Process *(@ Mid-Year)*
* Transition Planning *(@ Mid-Year)*
* Misc. as identified by Chapter *(@ Both)*
 | Facilitator |
|  | **Parking Lot Review** | Facilitator |
|  | **Adjourn** |  |

**To be added in when agenda evolves:**

* Review of Key Accomplishments and Take-Aways from Day One
* Meals and breaks
* Evening activity(s) *(if applicable)*
* Venue site visits *(if applicable)*

**For Team Presentations:**

* Slide #1: Team Members
* Slide #2: Team Successes.
* Slide #3: Team Challenges
* Slide #4: SMART Goals
* Slide #5: Finance Slide *(in order to demonstrate how finance affects the department and chapter and any motions that will be presented at next board meeting)*
* Slide #6: Succession

Make these **SMART Goals** (Specific, Measurable, Attainable, Realistic and Time Sensitive)... and when at all

possible, make sure you are tying them back to the metrics. **SMART Goals** focus on the big picture, not tactical action items.

*Example:*

* Strategic Goal: Increase Chapter’s Retention Rate by 4%
* Tactical Action: Develop a New Member On-Boarding Program
* Tactical Action: Create an Ambassador Program

**Suggested Retreat Slide Deck Template**

We have created a sample slide deck in Power Point format for facilitators to use. It is not mandatory for them to use it. We make it available to them should they need and or want to use it.

If a facilitator chooses to not use the slide deck above, they are required to incorporate either the MPI global and or Chapter logo in their slide deck. Facilitators can secure approved MPI global logos directly from the CBM.

*Note: Chapters may ask that facilitators include various retreat sponsor logos in their slide deck. If they do, the Chapter should provide the appropriate artwork to the Facilitator.*

**Post Retreat Attendee Evaluation Form (Annual & Mid-Year)**

**Retreat Content/Objectives:**

**1. Did you understand the objectives and goals for the retreat prior to arrival?**

Yes \_\_\_\_ No \_\_\_\_

If no, please tell us why:

|  |
| --- |
|  |
|  |

**2. Please rate the overall effectiveness and value for each of the retreat agenda topics:**

**(Scale 1-5)** *(1=minimal effectiveness and value / 5=maximum effectiveness and value)*

|  |  |  |  |
| --- | --- | --- | --- |
| Team Presentations | \_\_\_\_\_\_\_\_\_\_ | Business Documents | \_\_\_\_\_\_\_\_\_\_ |
| Attendee Expectations | \_\_\_\_\_\_\_\_\_\_ | Brainstorming | \_\_\_\_\_\_\_\_\_\_ |
| CBM Presentation | \_\_\_\_\_\_\_\_\_\_ | Team Building | \_\_\_\_\_\_\_\_\_\_ |
| Chapter Specific Discussions | \_\_\_\_\_\_\_\_\_\_ | Next Steps | \_\_\_\_\_\_\_\_\_\_ |

Additional Comments:

|  |
| --- |
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**Retreat Facilitation & Management:**

**1. Do you understand the role of your CBM?**

Yes \_\_\_\_ No \_\_\_\_

If no, please tell us why:

|  |
| --- |
|  |
|  |

**2. Do you understand the ideas presented during the MPI Global Overview and Metric/Dashboard discussion?**

Yes \_\_\_\_ No \_\_\_\_

If no, please tell us why:

|  |
| --- |
|  |
|  |

**3. Please rate the effectiveness of your CBM relative to this retreat regarding their participation and a resource to the chapter. (Scale 1-5)** *(1=minimally effective / 5=majorly effective)* \_\_\_\_\_\_\_\_\_

**CBM Name:**

Comments:

|  |
| --- |
|  |
|  |
|  |

**4. Please rate your facilitator on the following (Scale 1-5)** (1=low / 5=high)

 **Facilitator Name:**

1. Facilitator’s ability to elicit a wide range of participation \_\_\_\_\_
2. Facilitator’s ability to hold your attention and keep topics on track \_\_\_\_\_
3. Facilitator’s ability to draw discussions to a useful conclusion \_\_\_\_\_
4. Was your facilitator successful in engaging you in the retreat? \_\_\_\_\_
5. Would you recommend the facilitator to others? \_\_\_\_\_

Comments:

|  |
| --- |
|  |
|  |
|  |

 **Overall Retreat Review:**

**1. Please rate the retreat on the following (Scale 1-5)** (1=low / 5=high)

1. Extent to which you think retreat objectives were achieved \_\_\_\_\_
2. Extent to which you think a realistic business plan was developed (not applicable for mid-year retreats) \_\_\_\_\_
3. Extent to which you were able to acquire valuable take-aways from the retreat to help you
succeed \_\_\_\_\_
4. Extent to which you believe the board is moving in the same direction \_\_\_\_\_
5. Do you think the decisions made at the retreat will guide the chapter on a path to success \_\_\_\_\_

Comments:

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| --- |
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**­MPI \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Chapter**

**Post Retreat Facilitator Report**

**Facilitator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**POSITIVE ELEMENTS:**

**AREAS OF NEEDED IMPROVEMENT / ATTENTION:**

**MISCELLAENOUS NOTES:**

**NEXT MID-YEAR RETREAT (2017) RECOMMENDATIONS:**

**NEXT ANNUAL RETREAT (2017) RECOMMENDATIONS:**

**ANY ADDITIONAL COMMENTS YOU WOULD LIKE TO ADD:**

**FOLLOW-UP ACTION ITEMS FOR CBM:**