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Retreating to advance together: communicating through internal and external retreats

Gwen Gregory

Northern Illinois University, A1912956@mail.niu.edu

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Retreating to Advance Together

Communicating through Internal
and External Retreats

It can be challenging to step away from our daily work in technical services. There are always invoices to be paid, licenses to be reviewed, and books to be cataloged. However, when we take a deep breath and “escape” together as a group, we can build new bonds and come up with fresh ideas. Leaving the day-to-day behind, spending time together in a different environment, and participating in thought-provoking activities can lead to many positive results.

BACKGROUND

The University of Illinois at Chicago (UIC) is a large urban research university with a student population of 33,500 (22,000 undergraduate, 11, 500 graduate and professional). The campus has a substantial research enterprise as well as the largest medical school in the United States. The UIC community also includes 2,800 faculty members and 6,000 staff. The UIC Library is comprised of five sites across the state: two libraries in Chicago, as well as ones in Rockford, Peoria, and Urbana. Within the library, the acquisitions, cataloging, electronic resources, and collection maintenance for all of the UIC Library sites are managed centrally by the Resource Acquisition and Management (RAM)

Department, which was created in 2010 as a result of a merger of the Cataloging and Acquisitions departments. The department currently includes 5 faculty librarians, 15 paraprofessionals, and 12–15 student employees, though these numbers have varied slightly over the time frame described in this chapter.

I began work as head of the RAM Department in May 2012. The previous head of this new department had departed soon after it was created, and no interim head had been appointed. As a result, some parts of the merger and subsequent reorganization had not been fully implemented, and staff members felt that their ideas and perspectives were not well represented to the library administration. Several staff members also retired around the time I joined the department, which added to the feeling of instability.

As I got to know the department, I saw many excellent people focused on their individual work, but lacking understanding of each other’s responsibilities or what we accomplished in total and how the pieces fit together. The creation of a new mission statement and strategic plan for the entire library, however, gave us an opportunity to clearly align the department’s work to the library’s overall mission. Drawing from my experience at other libraries, I suggested that we hold a departmental retreat. This idea was met with both enthusiasm and confusion; some staff members were not familiar with the retreat concept, and others were jaded about meetings in general.

We created a team of several volunteers to work on our first retreat. As the department head, I led the planning, obtained funding from library administrators, and coordinated participation from those outside the department. Between 2014 and 2019, the RAM Department at the UIC Library held five retreats (see figure 3.1). Planning these enabled a number of departmental staff members to develop and practice their leadership skills.

Date	Length	Topic(s)
August 2014	Full day	Mission statement
March 2015	Half day	Internal and external communication
October 2015	Full day	Technology, department initiatives, and goals
January 2017	Half day	Collaboration (invited participants from other departments)
February 2019	Three-quarters day	Reorganization, department initiatives, and goals

FIGURE 3.1
Chronology of RAM Department retreats

LIBRARY RETREATS

Retreats are generally defined as events where a work group leaves their usual working space to gather elsewhere for a defined length of time and engage in planned activities while avoiding outside interruptions. Retreats are longer than normal meetings and focus on longer-term issues and concerns. The reasons to hold a retreat are varied but include fostering change, creating a collective vision, exploring staffers' fundamental concerns, and making tough decisions. The support and encouragement of departmental and library leadership is key for an effective retreat. Managers should be prepared to implement the changes suggested at a retreat, thus demonstrating that the process is taken seriously.

Bolman and Gallos's four frames model provides insights into some of the potential benefits of retreats.¹ In fact, these frames (structural, political, human resource, and symbolic) are applicable to many workplace situations found in academia and in organizations generally. Each frame may be appropriate in different situations; an effective leader can use them all as needed.

Structural frame: Focuses on process and rationality, and therefore comes naturally to many workers in technical services. The retreat can be a powerful analytical tool, providing space and perspective to understand departmental structures and workflows.

Political frame: Important in building relationships within and throughout the organization. A retreat is an occasion to build coalitions and negotiate as well as to plan strategies.

Human resource frame: Focuses on communication and developing people. Relationship-building, including developing confidence and trust in each other and in leaders, can be a part of the retreat.

Symbolic frame: Uses ceremony and ritual to tell our story and create a shared vision. The retreat is a space to develop our culture as well as our vision of ourselves.

All of these frames depend on communication; without connecting to each other, the organization, and the world, we are unable to work together effectively and efficiently.

Within the library field, retreats have long been used for team-building and improving communication.² This is true for technical services units as well. For example, one large university library's technical services department held a retreat focused on restructuring its workflows.³ An outside facilitator helped design a card-sort activity which resulted in new departmental organizational models. The activity divided employees into four random groups that then used sticky notes to analyze the department's work tasks. This activity succeeded in engaging everyone in the process and ensuring that their ideas were heard and collected. Other technical services units have held retreats

focused on building teams, improving communications, enhancing social bonds, and creating momentum for change. Interviews with librarians who planned and conducted those retreats showed positive comments and results. In addition, those interviewed emphasized the need for proper planning and facilitation, as well as gathering feedback from participants. All the librarians said they would encourage future retreats or similar group events.

PLANNING

When planning a retreat there are several factors to consider. The retreat should be related to the day-to-day work but not focus exclusively on the details. A variety of participants should be part of the group tasked with planning the retreat, and a facilitator from outside the group is recommended, both to display neutrality and to promote participation by the group's leaders. The facilitator may be from another library department, from another part of the organization, or hired from outside the organization.⁴

The RAM Department's first retreat in 2014 was experimental in that most staff members had never participated in such an event. An intrepid group of volunteers, led by me and including one other faculty member and four paraprofessionals, agreed to work on the planning. As it was our first retreat, much discussion was required to determine our goals and how we wanted the event to proceed. We met every week or two for the four months before the retreat took place. Individual planning team members took on responsibility for coordinating separate activities related to the retreat. For example, one person took the lead on managing the food, and two others worked together on games and team-building. As the department head, I scheduled meetings and obtained funding from the library administration to pay for food, supplies, and the room rental. In later retreats I also asked for volunteers to work the events.

The planning process for each of our retreats was similar and usually started with decisions regarding its date and location. We found that planning may take several months, so it was good to begin discussions around these points early. Our main costs were generally food and the space rental, so those were important considerations throughout the planning process.

Date and time: Keep in mind any scheduling restrictions such as holidays, school vacations, and the individual schedules or shifts of participants. The date will help you to determine a location that is available at the time you need it, as well as help with planning other logistics such as food.

Prior notification: To avoid any confusion with colleagues in other library departments, we notified them of a retreat's dates and times. Some staff members also left a message stating that they would reply to requests the day after the retreat.

Location: We have found that a location away from the usual work space is preferable. This helped people to mentally separate from their daily tasks, as well as providing freedom from interruptions. In our first retreat, we visited several locations before determining that using a room at the student center was convenient and within our price range. In subsequent retreats we also used other locations in the library building. Additional possibilities may include hotels or retreat centers. It is crucial in all these discussions to keep the transportation needs of participants in mind, as travel off site might require a bus or other option.

Once the date, time, and location were set, we tackled other tasks in the planning process, such as food and activities. With a team working on the event, specific tasks can be assigned to individuals who can report back to the team on their progress. Individual staff members enjoyed working on these activities because they provided some variety from their daily jobs.

Themes are one more option to consider. We found that themes provided opportunities for decorating and other creative outlets. For example, our retreat after our departmental reorganization was themed "Under Construction." We used yellow warning tape, construction worker vests, and themed napkins and plates to create an engaging atmosphere for the day. The themes of our other retreats have included "Back to the Future" and "Tropical Vacation."

Finally, as mentioned earlier, a facilitator is crucial for a successful retreat. As part of the planning process, I asked the planning team who they would like to have facilitate, and they preferred an internal person. Because of this we have generally had the department head act as the facilitator for our retreats. However, some sources recommend an outside facilitator, in part because this allows all department members to participate fully.⁵ This is something we have discussed, and we will consider how it can be accomplished for future retreats.

After holding several retreats in close succession, we have concluded that a full department retreat is probably best every two years or so, depending on the major activities and events impacting us. For example, we are currently migrating to a new library management system, and a retreat focusing on the impacts of that project and assessing what we need to do next will be planned for after the implementation. This retreat may include outside participants who also use the system.

Activities

While planning the first retreat, we developed an agenda that would serve as a model for future events, with a mix of work-related small and large group discussion, team-building activities, goal-setting for the department, and social time. We incorporated as much interaction into the retreat as possible, encouraging communication in a number of ways. The participants took part in several icebreakers to help them learn more about each other. They were also divided into small discussion groups, which then reported back to the entire group at a later point. These agendas were essential because they let participants know what to expect and when. (See figure 3.2 for a sample agenda.)

Each retreat was planned with a blend of practical and entertaining activities, all with an emphasis on communicating with colleagues. Common elements across all retreats included icebreakers, team-building activities, food, visits from library administrators, and the development of an end product such as a mission statement or departmental goals.

Though seemingly less crucial, the fun activities are definitely an important part of the experience. They allow colleagues to get to know each other in a new way, which promotes better communication. While you may think that everyone already knows each other, there are many icebreakers available online that will reveal new things. You should aim for activities that include

Time	Activity
9:00-9:15	Introduction/welcome
9:15-9:30	Icebreaker
9:30-10:00	Small group discussion: collaboration
10:00-10:30	Small groups report out
10:30-10:45	Break
10:45-11:00	Small group discussion: project ideas
11:00-11:45	Small groups report out
11:45-12:30	Lunch/relaxation
12:30-1:15	Wrap-up/future steps
1:15-1:30	Teambuilding activity
1:30-1:45	Farewell/special guest

FIGURE 3.2
Sample retreat agenda



FIGURE 3.3
The author with UIC mascot Sparky

everyone and which can be completed in the amount of time allotted. Opportunities to stand up and move around will wake people up and stimulate creativity. Team-building games may fit better toward the end of the retreat, providing a chance to blow off steam after in-depth discussions. Teams can be assigned by having people number off to provide random groupings. Personality quizzes and tests are also engaging activities for a retreat because they can provide colleagues with insight into how to work with each other more effectively. In one of our retreats, we each completed the True Colors personality test.⁶ After a short presentation on the test's results and what they meant, we split into groups by color. Each group discussed their communication style and how they would like others to communicate with them. The groups then shared these ideas, helping colleagues to develop better strategies for working together.

Discussion and goal-setting are challenging work and everyone will appreciate a break, so it is also important to set aside social time as part of the retreat. Participants enjoy having a chance during lunch to socialize. One of the most enjoyable parts of our 2017 retreat was the visit of our campus mascot, Sparky D. Dragon, as the farewell guest (figure 3.3). Everyone enjoyed posing for photos with Sparky, and the campus spirit office was happy to provide the visit at no charge.

Outside Staff

Though this was more challenging to organize, including staff from other departments who had not previously joined our retreats helped us expand our communication within the library. The success of planning a cross-departmental

retreat required buy-in from the heads of the other departments, followed by willing participation from selected staff members in those departments. Together, our team built an agenda that we hoped would be interesting and understandable to all involved, and we made special efforts to welcome all participants. We used this cross-departmental retreat as an opportunity to build relationships and strengthen communications with our library colleagues. Some of the participants external to our department were long-term library staff who were nevertheless surprised to learn details about our department's operations. They were impressed by the full engagement of technical services staff in the retreat process, as well as our commitment to creating and executing our goals. Technical services staff appreciated the opportunities to explain their work to external colleagues and to work together on developing new processes and services that benefited both internal and external users.

Assessment

The final step for each retreat was to conduct an online assessment of the event. It is best to have the survey ready to go before the retreat in order to request feedback while the experience is still fresh in participants' minds. The results from these assessments have provided us with data to help in planning future events. The response rates for the surveys were generally good, ranging around 40–60 percent.

An online survey, using a tool like Survey Monkey or Qualtrics, makes collecting, analyzing, and sharing the results easy. (See figure 3.4 for a sample and figure 3.5 for selected results.) In these evaluations, respondents were generally asked to rate each aspect of the retreat on a scale from very good to very poor in order to get their feedback on all the activities. Many parts of the surveys requested qualitative answers using comments boxes. We asked for comments on any specific activities and what participants liked most and least about the retreat. Finally, we requested suggestions for future retreats or activities, as well as final comments.

The respondents rated most activities positively, but it was easy to see which activities were the most and the least popular. Lunch was usually rated highly, while some specific icebreakers did not work out as planned. The respondents often had helpful and detailed suggestions that we took to heart. In future retreats, for example, we shortened the length of the retreat, invited staff members from other departments, and planned the team-building activities more carefully.

In our retreats we continue to provide snacks, drinks, and lunch and to incorporate fun activities like icebreakers. Each time we start to plan a retreat, we review the previous evaluation results and incorporate what we have learned into the new event. Having the department head lead the planning and assessment has provided continuity, as it would be easy to lose track of previous survey results and documentation such as agendas and notes.

Please rate the following activities at the retreat:					
Activity	Very Good	Good	Fair	Poor	Very Poor
Icebreaker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tech topic session in Idea Commons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic initiatives discussion with Mary Case	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Costume content/ other free time activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Small group discussion and reporting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Full group discussion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teambuilding activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wrap-up and future planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preretreat communications (agenda, flyers, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lunch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snacks and other refreshments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Location/room	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Breaks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you have comments on any specific activities?

What did you like most about the retreat?

What did you like least about the retreat?

What ideas or suggestions do you have for future department retreats or activities?

Please add any other comments about the retreat.

FIGURE 3.4
Sample evaluation of a retreat

Date	2014	March 2015	October 2015	2017	2019
Number of respondents	11	12	8	18 (12 RAM, 6 other departments)	7
Percent responding	61	67	44	60	39
Most popular	Mission statement discussion and creation	Lunch	Food, internal communications discussion	Small group discussion, location	Ice-breaker
Least popular	Location/room	Tech topics	Games	Handouts	NA

Sample Comments:

“The discussion surrounding the mission statement was very engaging and everyone had an opportunity to participate. It really helped to us to better define what the RAM Department is.”—2014

“From the notes, I think I see everyone on agreement on communication being an issue everyone is willing to work on.”—2015

“I liked learning more about my coworkers.”—2015

“Coming together and getting a better understanding of how one does their job and how it affects another person or unit. Communication is always good.”—2017

“I liked that one of the activities really reflected how our department is: everyone was giving their advice and helping in completing the obstacle course.”—2019

FIGURE 3.5
Sample evaluation of a retreat

OUR EVENTS

Developing a mission statement for the department was an important goal for our first retreat in 2014. Working with the associate dean, we reviewed the library’s mission statement and strategic plan, and during the retreat we broke up into groups to brainstorm ideas about our own department’s mission. After lunch and downtime, we came together to discuss the ideas generated and narrow them down in a facilitated discussion. The result was a concise statement of just twenty words: “RAM acquires, organizes, and maintains information resources, providing access for users by working in collaboration

with internal and global partners.” This mission statement has proved to be a terrific focus for us in the ensuing years. We include it in our annual report, have it printed on bookmarks that are given to new staff and visitors, and display it on a banner at the entrance to our physical office area.

Our second retreat, which we called a retreat refresher, was a half-day event in March 2015. This retreat focused on communication, both within the department and with outside clients. We watched Seth Godin’s TED talk “This Is Broken,”⁷ an entertaining discussion of the ways that marketing, signs, and other methods we use to communicate can fail. We used Godin’s examples to spur discussion of ways that our current communication was ineffective. For example, had we created complex signs or forms to interact with our customers rather than fundamentally changing our processes so that they work better? We again used the technique of small group discussion followed by large group reporting, with the sessions focusing on internal and external communication. The result was a number of new ideas to improve our communication, including ways to better indicate location changes, creating e-resource tutorials and guides, and providing more guidance for library liaisons and others on e-books and how to access them.

In October 2015, at our third retreat, we focused on developing specific goals and initiatives based on our department’s mission and the library’s strategic plan. As an introduction to the topic, the library dean spoke with us about current campus and library initiatives. We then conducted small and large group discussions of important roles the department could play in meeting the library’s goals. The result was a number of initiatives for the department, which included better cross-departmental communication, learning more about the library’s special collections, and providing more guidance about e-books and how they work. Teams were formed to work on several of these goals. The day also included other elements, such as an introduction to several technology resources useful for department staff: the library wiki, macros for cataloging, and cloud storage via Google Drive and Box. The retreat lasted for a full day, with lunch provided.

Our fourth retreat took place in January 2017. At this event, staff members from several other departments were invited to participate in many of the sessions. Colleagues from the circulation, systems, reference, special collections, and digital programs areas were invited. This was a natural outgrowth of our emphasis on external communications. We hoped that by having external players involved in our discussion, we could learn from them and craft new ways to enhance our relationships. We consciously focused discussion on how the RAM Department could meet the needs of outside colleagues and their departments, and it was very helpful to get comments directly from our internal stakeholders. As a result, the new item-processing instructions and forms were revised and a library-wide metadata task force was formed. The participants also formed social relationships, which provided new paths

for interdepartmental interactions. This retreat lasted for a full day with lunch provided, although the external participants were not required to attend for the entire time. We asked that they be there in the morning, and then invited them to stay for lunch. The post-lunch activities were optional for them.

Our most recent retreat was in February 2019. This event occupied most of a day and included lunch. A major departmental restructuring had taken place in the latter half of 2018, and as a result this retreat was focused on discussions of and refinements to the new structure. We began by reviewing the library's latest strategic plan, followed by conversations regarding the current state of our department's internal and external communications. We ended by developing goals for the next year and formed teams to work toward those ends. The goals included the creation of a team to work on improving relations with subject liaisons and other staff, improving communications with the business office, and having each unit within the department hold regular unit meetings. Since the retreat, we have discussed progress on these goals at our monthly department meetings. The teams working on two of the original goals ended up converging and merging into a single team focusing on outreach. One year after the retreat, we had accomplished all the goal activities and were ready to start planning for a new retreat.

CONCLUSION

Communication has been an ongoing theme in our retreats. We have designed activities specifically to help us get to know each other and our individual communication styles better. The time away from our usual tasks was well-spent, allowing us to examine our work in new ways and to develop longer-term plans, many of which were related to communication within the department as well as externally. Colleagues learned about each other by participating in exercises and developing goals together. We took time to think deeply about our internal customers in other library departments, looking at recurring challenges and developing goals to improve our services. These included establishing new outreach specifically for liaison librarians, as well as a cross-departmental task force to develop clearer procedures for the handling of rush items.

Research suggests that nourishing positive relationships at work is a powerful way to improve workplace satisfaction, and we have learned that we benefit from this personally and as a group.⁸ Increasing and improving communication builds relationships as we learn about each other. This takes place through games and social time, as well as through team-building and workflow analysis. Our experience has shown that even staff members who are reluctant to participate at first can warm up to the retreat environment and benefit from joining in. Our department plans to continue holding retreats in

the future and we are looking forward to our next event, following our migration to a new library management system.

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