

## Planning Retreats Overview

- Situation:** As the leader you need to pull the team together to plan, think, and connect. Taking the time to get people's heads around the challenges and opportunities allows them to be working on the same page, to achieve the same goals, on the same timetable.
- Managing a retreat encompasses thoughtful planning, agenda design, facilitation and follow-up to accomplish a productive, yet fun and energetic experience. On-Purpose Partners ensures that your time away is a valuable investment.
- Product:** We listen, design, manage, facilitate and follow-up your retreat to address your business issues, team dynamics, and strategic objectives – accomplishing your goals! Our experience with for-profit and not-for-profit organizations ensures that your retreat is a successful turning point for your organization.
- Your unique advantage with On-Purpose Partners is that we are strategists who facilitate rather than facilitators who do retreats. We share strategic insights, advice, and recommendations. We get to the heart of the matter. To your benefit, you get a retreat designer, a facilitator and a seasoned business consultant all in one!
- Process:** Your Retreat Package with On-Purpose Partners includes:
- Advance planning and design:
    - Pre-planning consultation to understand and goals, strategic issues and team dynamics
    - Pre-surveys with attendees – their confidential answers offer insights, help guide the design of the agenda and engage participants in advance to accelerate the substance of the dialogue.
    - Development of a customized agenda with outcomes based on your objectives.
  - Day of the retreat facilitation
    - Facilitation and management of the day
    - Insights and advice as appropriate
    - Record-keeping of the event
  - Post-retreat report:
    - Flip chart records with key decisions made and next steps
    - Executive summary of observations and recommendations

**Previous Clients Say:**

The retreat was definitely a success! In fact, it has completely consumed the summer so far, with all the new initiatives  
*Geraldine Gallagher, President and CEO, Valencia Foundation*

Thank you for the terrific and professional job in facilitating our Executive Retreat and I look forward to working with you many more times. Your knowledge, energy and organization couldn't have been better. We all came away from the session much more aligned due to your leadership in facilitation.  
*Erik Berger, General Manager Walt Disney World Swan and Dolphin Resort*

Mary brought her extensive business gifts and years of work at Disney to help us at a pivotal juncture in our church's life. She helped us achieve all our goals with excellence. Her assistance was as beneficial as other well respected and noted church consultants that I have worked with in the past.  
*Dr. Patrick H. Wrisley, Senior Pastor and Teaching Elder - Community Presbyterian Church*

On-Purpose Partners offer wonderful services to address organizational effectiveness. Mary Tomlinson was our facilitator for the College Relations Advisory Board Meeting. Her uncanny knack to organize the meeting and drive our team to action was remarkable. Mary takes time to understand the uniqueness of each client. We couldn't be more pleased. I highly recommend Mary Tomlinson because simply stated...she is the BEST! Thanks again for your wonderful work Mary. You are truly an inspiration and your hand has been significant in moving us in the right direction. I really appreciate having the opportunity to work with you."  
*Tiffany Sellers, ARAMARK, Director of College Relations*