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**Summer Retreat Planning Tips**

Gathering leaders over the summer break for a summer retreat is an opportunity for everyone to think about their positions and plans for the next school year.

Choose the Right Date

To encourage maximum attendance, it’s important to get the date right. Create a Doodle poll with many options for your leaders to choose from, then select the best date prior to August 15th. Anticipate the retreat to last between 2-3 hours.

While it is not ideal to not have some leaders in attendance, it is better than not having a retreat at all and starting the year behind schedule. If leaders cannot attend, ask that they provide input prior to the retreat and then hold an overview meeting with them as soon as they are available.

Do Some Advance Prep

Remember to distribute relevant documents such as calendars, standing rules, financial statements in advance by the end of the school year and handing out printed copies at the retreat. Chances are the incoming board is comprised of a mix of new and returning members, with varying levels of experience and familiarity with each other. In the invite, explain the goals of the retreat: to get to know each other, learn about operations, and plan for the upcoming school year.

Stick to an Agenda

To make the most of the time, run your retreat like a meeting, with an agenda prepared in advance. Consider asking for input from the officers as to what they hope to discuss.

The retreat agenda should include but not limited to:

* First part of the meeting is dedicated to brainstorming about the purpose of the PTA/PTSA
  + review duties of each position
  + review past activities & accomplishments
  + define the direction, vision and goals for the upcoming year
  + define a mission statement
* Second part of the meeting is to define how to accomplish the ideas that were discussed
  + discuss new ideas for the upcoming year that support the mission
  + create a calendar of events for the year
  + further develop the new budget
  + establish actionable items that need to be addressed in the short term

Make It Fun

Consider the location when planning your retreat. Keep it out of the school or library, if possible; a member’s home, a local gathering spot or even our Bellevue Council office are options. Start off with an icebreaker. Contact Council for ideas that might work for your team. How the retreat is structured will set the tone for the group and meetings: informational yet informal, friendly, and cooperative.

**Items to keep in mind when planning**

Most Common PTA/PTSA Roadblocks

* Communication
* Engaging International Communities
* Relevancy of the PTAs
* Volunteers
* District Wide Choice School Family Engagement
* Year-Round New Family Welcoming
* Male Engagement
* Time Limitations for Families
* Engaging the Un-Engageable
* Translations – Written & Spoken
* Removing Silos within Communities – within the School Communities, PTAs, and Community Partners
* Limited Financial Resources for Title1 PTAs
* Awareness on processes and procedures to remain in compliance with 501(c)3
* Awareness of financial constraints of families to participate in PTA programs
* Engaging all families - not making assumptions about what families **should** want vs. what they **do** want/need.

Calendar

Bellevue Council has provided a merged calendar that includes key dates to assist in planning from:

Bellevue PTSA Council

Bellevue School District

Washington State PTA

Community Partners

Holidays

Principal Input

Prior to the retreat, the president(s) should have had a meeting with the principal to discuss their thoughts, plans and goals for the year.

Community Partners:

Bellevue Special Needs PTA

Bellevue Schools Foundation

Bellevue Quality Schools

Eastside Pathways

Bellevue LifeSpring

Jubilee Reach