

## The ABCs of Great Retreats

*Submitted by Certified Forum Facilitator Eva Kedar*

### Overview:

This primer helps the Forum Moderator or Retreat Champion by starting with three essential ingredients for planning a retreat: A – attitude or mindset in the initial planning process and preparing for retreats; B – balance between fun and work; and, C – creativity.

### Description:

The ABC framework for retreat planning provides three sections:

1. Overview of why attitude, balance and creativity are essential ingredients to successful planning.
2. Specific examples for execution of attitude, balance and creativity.
3. Resources, including books, cards and books as tools for planning and execution.

## The ABC 's of Great Retreats

**It All Begins with Attitude:** *A great attitude does much more than turn on the lights in our worlds; it seems to magically connect us to all sorts of serendipitous opportunities that were somehow absent before the change. ~Earl Nightingale*

When forum members come to a retreat with an open mind, a positive attitude, a willingness to engage and a sense of humor, they'll have a successful retreat. When each forum member has a specific role to play in the retreat, they each have a stake in creating a productive experience. Applying creative titles to each role adds humor and levity, and can even enhance a member's attitude toward their role. Retreats frequently need CLO's (Chief Learning Officers), CFO's (Chief Food Officers), CRO's (Chief Recreation Officers), etc...

**From There We Add Some Balance:** Striking the right balance between “fun”, recreational and social activity and “forum work” is very important. Forum work in retreats includes exercises to foster personal growth and team connectedness. It can also involve activities to help the forum enhance its vision and deepen commitments among members. Fun activities bring humor and laughter that promote learning and community building. When planning a retreat it is important to allow enough time for each member to share in a meaningful way and for the forum group to interact at a higher level. Retreats that are packed with “too much,” feel over-structured, rushed and can be very exhausting. This is at odds with the original purpose of the retreat.

**And a Hefty Dose of Creativity:** *The voyage of discovery is not in seeking new landscapes but in having new eyes. Marcel Proust*

The most successful retreats are those where the activities and exercises are most memorable (our minds tend to forget the ordinary). Retreats need to feel very special - different from regular forum meetings.

Some ways to make retreat exercises more memorable include making use of creative, "right brain", and artistic expression. For example, incorporating drawing, articles of clothing, acting and masks can be stimulating ways to tap into the unconscious. Talking about unusual or even taboo topics (sex, money) tend to be memorable. This retreat approach is equally productive for men, women, artistic types and assertive CEOs – as long as forum members are willing to discover, learn and “play.” Group activities such as sailing, rope courses or treasure hunting are preferable to individual activities such as down hill skiing. Effective ways to foster exploration and laughter include engaging in “out of comfort zone” activities such as cooking or gardening for men and hunting for women. Collaborating together in creative, unique ways ultimately becomes ingrained into the DNA of the Forum that bonds the group together.

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**GREAT RETREATS:** Some Specific Examples:

**Attitude** can be shaped by pre-work. Getting forum members in the right mindset for the retreat can be achieved by asking them to start thinking ahead of time about various aspects of their forum. They can begin to formulate responses to questions like:

*What is your vision for your forum for the upcoming year? Specifically, what do you expect or need in order for the forum experience to be meaningful and meet your needs?*

*What guiding principles need to be in place to achieve your vision?*

*What commitment do you expect from your fellow forum members? How are you going to hold each other accountable for your commitments?*

*How can you build trust and respect in the forum?*

*How can the forum support a member in need?*

Specific pre-retreat communication starters can be given to forum members when they are car-pooling or flying together to the retreat. The ride feels much shorter and people get closer in the process. Here are some examples:

*What is the most surprising thing you have learned about your childhood? What about your parent's childhood?*

*Who is the one person who has done the most to make you who you are today? How was that person significant to you?*

*What do you think is the single best decision you've made in your business / your life so far?*

*What would you like to be doing five years from now? What do you think you will be doing five years from now? What dream(s) do you have that you would like to see become reality?*

**Balance** between “fun” and “forum work” can be acquired by teaming up with a professional facilitator. The moderator and/or retreat committee members together with the facilitator can define clear goals for the retreat and shape an appropriate agenda. Exercises and activities are chosen based on the time available and size of the group. Exercises like Life Line, Life Walk, and Fathers are most effective when working after dinner into the “magic” of the night. For a winning combination, add a campfire.

**Creativity** comes in choosing the location and retreat topic. A possible creative retreat topic is: **“What’s Your Type”?** Exploring the Enneagram. The Enneagram is one of the most powerful and ancient tools for understanding ourselves and the way in which we perceive and experience the world. By exploring the Enneagram’s nine types of personality, forum members are better able to look at their own specific leadership styles, as well as those of their partners, colleagues, competitors and forum members. They can then utilize this tool to identify strengths as well as areas for improvement in their own styles and begin to develop a plan to leverage these strengths and work on those areas where improvement would be useful.

A creative “right brain” flavor can be added to the retreat by incorporating articles of clothing, hats and various “personality objects” to help participants describe their style. The retreat is equally productive for men, women, artistic types and assertive CEOs – as long as forum members are willing to discover, play and have fun.

## RESOURCES FOR CREATIVE FORUM WORK

### Games/Cards

- “The Four Agreements” (A card Deck) by Don Miguel Ruiz (2000)

Hay House, Inc

P.O. Box 5100. Carlsbad, CA 92018-5100

Phone: (800) 654-5126, Fax: (800) 650-5115

- “The Ungame” (The World’s Most Popular Self Expression Game) by Rhea Zakich (1993)

Talicoor Inc,

8845 Steven Chase Court

Las Vegas NV 89129

- “Conversation Pieces: Parents, Kids and Others Animals” by LifeStories (VHS 1993)

701 Decatur Avenue North, Suite 104

Golden Valley, MN 55427

- “Teamwork: The Game that Works” by Alban Associates, Inc  
World Class Consulting and Education  
10616 Beaver Dam Road  
Hunt Valley, Maryland 21030-2205  
Phone: 410-771-3031, Fax: 410-785-1412

## **Books to trigger your thoughts:**

- “The Braintickers II” (Questions for CEO’s) by Elizabeth Arnold & Rob Beckstrom (2001).  
Braintickers Publishing  
1705 14<sup>th</sup> Street, suite 136  
Boulder, CO 80302  
Phone: 303-247-1539, Web: [www.braintickers.com](http://www.braintickers.com)
- “If...(Questions for the Soul) by Evelyn McFarlane & James Saywell (1998)  
Villard Books  
New York, NY 10022, [www.randomhouse.com/atrandom](http://www.randomhouse.com/atrandom)
- “The Book of Questions” by Gregory Stock, Ph.D. (1985,1987)  
Workman Publishing Company Inc.  
708 Broadway  
New York, NY 10003
- “A Guide for Grown-Ups: essential wisdom from the collected work of Antoine de Saint-Exupery” (2002)  
Harcourt, Inc.  
525 B Street,  
San Diego, CA 92101, [www.HarcourtBooks.com](http://www.HarcourtBooks.com)

## **Creativity Books:**

- *The Creative Gap: Managing ideas for profit* by Simon Majaro
- *Lateral Thinking Course* by Edward De Bono,
- *Six Hats* by Edward De Bono

- *Thinkertoys (A Handbook of Business Creativity)* by Michael Michalko
- *Whack On The Side of The Head* by Roger Von Oech

# Forum Retreat Competition Submissions – Final 10



<b>Retreat Name:</b>		<b>Executive's Cup</b>			
<b>Location / Venue:</b>		San Francisco, California			
<b># Days:</b>		3			
<b>Moderator Name :</b>		<a href="#">Laura Neiman</a> (YPO Windy City)			
<b>Facilitator Name:</b>		<a href="#">Sue Hesse</a>			
<b>Forum Retreat Schedule</b>					
		3/10/2013	3/11/2013	3/12/2013	3/13/2013
<b>Morning</b>			Resource over breakfast 8am - 12pm	Leave for Executive's Cup at 7:30am	Breakfast 9am - 10:30
<b>Mid-day</b>			Lunch at/near apartments	9am - 6:00pm - Sail race prep with semi- professional coaches. - Lunch on boats	
<b>Afternoon</b>	- Check in at Noe Street by 2pm. - Forum Exercises 4pm - 7pm		12:30pm leave for 2715 Hyde Street ~1:00pm Biking over GG Bridge to Sausalito	- "Executive's Cup" Race, following America's Cup route	
<b>Evening</b>	Dinner 9:00pm - Foreign Cinema 2534 Mission Street, 94110		Ferry back to SF  8:30pm Locanda at 557 Valencia Street (between 16th & 17th) Phone #415-863-6800. Reservation for 9 people at 8:30pm.	6:00 - 7:30pm Drinks at Historic St. Francis Yacht Club  9:00pm Abbot's Cellar, 742 Valencia Street	
<b>Late</b>	TBD		TBD	TBD	
<b>Best Practices</b>					
<ul style="list-style-type: none"> <li>- Split the full day resource into two half-days to keep everyone fresh, energized. Complete forum surveys and exercise preparation in advance. Send reminders to the forum members to ensure that nobody forgets!</li> <li>- Handle annual meeting calendar planning and forum officer elections during the retreat to ensure real take-home value.</li> <li>- Agree on level of confidentiality for forum retreat. Share nothing about who/where/when? Share only general concepts but no details? Every forum has different tolerance levels. Must be clear up-front or risk potential conflict.</li> <li>- Stay in multi-bedroom apartments (found on VRBO) instead of individual hotel rooms to save money on lodging and to have working space for forum exercises - Collect money for the retreat (capital call) BEFORE the event and have one person pay all the bills to keep the paperwork easy</li> <li>- Use local YPO expertise to identify activities (adventures, food, etc.) that fit your forum's taste. We've found success by contacting local chapter officers AND local chapter administrators.</li> <li>- Start planning at least 8 weeks in advance</li> </ul>					
<b>Useful Contacts</b>					
<p>Limo Service: Five Emerald Limousine 28 reviews Rating Details Categories: Tours, Limos, Airport Shuttles San Francisco, CA 94123 Serving San Francisco and surrounding area IRA: (415) 812-1757 <a href="http://www.fiveemeraldlimo.com">http://www.fiveemeraldlimo.com</a></p> <p>Bike Tour Company: Lauren Sailor Blazing Saddles Bike Rentals and Tours 2715 Hyde Street San Francisco, CA 94109 tel. 415.202.8888 fax 415.929.8687 <a href="http://www.blazingsaddles.com">www.blazingsaddles.com</a></p>					

Sailing lessons/racing: Anthony Sandberg Offshore Sailing School anthony@ocsc.com 1 Spinnaker Way, Berkeley, CA 94710 Phone:(510) 843-4200

Forum Resource: sdh@hessepartners.com Sue Hesse CEO | Global Forum ResourceHesse Partners | La Jolla | CaliforniaT : 858.883.4489 | www.hessepartners.com

Great Multi-bedroom

Apartment Rental in SF: [http://californiavacationrentals.net/sanfrancisco\\_vacation\\_main.html](http://californiavacationrentals.net/sanfrancisco_vacation_main.html) Laurie Sweeting 916-789-7736 sanfranciscoflat@aol.com 153 and 155 Noe Street

# Forum Retreat Competition Submissions



<b>Retreat Name:</b>	<b>Forum 5 in San Diego</b>
<b>Location / Venue:</b>	San Diego, California – Private Home
<b># Days:</b>	3
<b>Moderator Name :</b>	<a href="#">James Edwards</a> (YPO Santa Monica Bay)
<b>Facilitator Name:</b>	<a href="#">Sue Hesse</a>
<p><b>Overview</b></p> <p>As the majority of our members were new to the forum, we used this retreat as a forum kick-off and to establish our forum norms, goals and culture. The facilitated portion of the retreat set the right tone and allowed us to focus on how we could become a high performing forum. The alternate activities provided the shared experience that drove the foundation of our relationships and the uniqueness of the resource we were able to spend time with at the SEAL base provided the "only in YPO" aspect to make it truly memorable.</p> <p>This retreat was also a team effort where members of the forum really contributed to the planning with one member find the house which was right on the beach (which they were able to procure for us for free), another member securing the Base Commander and another managing the finances</p>	
<p><b>Best Practices</b></p> <p>We spent much of the retreat focused on forum norms and establishing the right foundation for the forum. We considered this a very important best practice. We also focused on learning how to experience share in stead of give advice and why that was important.</p> <p>In addition we added an issues clearing component to our normal forum agenda and worked to formalize our forum processes including getting a secure online drive account for our forum information.</p>	



# Forum Retreat Competition Submissions

<b>Retreat Name:</b>	<b>Muscat Forum Retreat / Integration</b>			
<b>Location / Venue:</b>	Muscat, Oman – Al Bustan Palace Hotel			
<b># Days:</b>	4			
<b>Moderator Name :</b>	<a href="#">Salim Dewji</a> (YPO Johannesburg Golden City)			
<b>Facilitator Name:</b>	<a href="#">Ken Tyler</a>			
<b>Schedule</b>				
Times	21st, Wednesday	22nd, Thursday	23rd, Friday	24th, Saturday
8am	Arrive in Muscat	Breakfast at Hotel	Breakfast at Hotel	Breakfast at Hotel
8.30am	Visa Collection	Al Khiran Pool Terrace	Al Khiran Pool Terrace	Al Khiran Pool Terrace
9am	Collect Hired Car	Depart for Mosque	Forum Session with Ken Tyler at the Hotel (9am - 1pm)	Depart for Wave Marina
9.30am	Depart for Wadi Shab	Sultan Qaboos Grand Mosque Experience		Meet with <a href="#">Nailesh</a>
10am		Return back to Hotel		Daymaniyat Islands Experience Boat Cruise and Snorkelling
10.30am		Lunch at the Hotel		
11am	Wadi Shab Experience	Forum Session with Ken Tyler at the Hotel		Lunch at the Hotel
11.30am			Lunch at the Hotel	
12pm		Lunch	Forum Session with Ken Tyler at the Hotel	Forum Session with
12.30pm	Forum Session with			
1pm	Lunch	Forum Session with Ken Tyler at the Hotel	Forum Session with	
1.30pm			Forum Session with Ken Tyler at the Hotel	
2pm	Lunch	Forum Session with Ken Tyler at the Hotel	Forum Session with	
2.30pm			Forum Session with Ken Tyler at the Hotel	
3pm	Lunch	Forum Session with Ken Tyler at the Hotel	Forum Session with	
3.30pm			Forum Session with Ken Tyler at the Hotel	
3.30pm	Drive			

*Schedule continued on next page*

# Forum Retreat Competition Submissions

4pm	to Hotel	(1pm - 5pm)	Ken Tyler	
4.30pm	Al Bustan Palace		at the Hotel	Depart for Hotel
5pm	Hotel Check in		(2pm - 6pm)	
5.30pm	Relax Time	Relaxation Time		Wellness center or Infinity Pool
6pm		Depart for Opera House	Relaxation Time	
6.30pm			Depart for Market	
7pm	Depart for 'Dinner'	Royal Opera House experience	Muttrah Souk Market	
7.30pm	Street Food Experience			Depart Hotel
8pm				
8.30pm	Drinks at Sofia's		Dinner at the	Chedi Hotel Dinner with Oman Chapter (8pm - 10.30pm)
9pm		Depart for Restaurant		
9.30pm			Mumtaz Mahal Restaurant	
10pm	Return back to Hotel	Dinner at Kargeen Restaurant		
10.30pm				
11pm		Return back to Hotel	Return back to Hotel	Depart for the Airport

## Agenda

Date November 22-23, 2012 - Author Ken Tyler Forum

**Location:** Oman Participants Thabo

**Objectives:** Integrate old and new members

Review forum norms

Build upon forum dynamics

Plan moderator succession

Responsible Item Preparations Materials & Supplies Time Duration

### Forum Critical Success Factors ->

13:00 Norms (0:10)

13:10 Forum Shared Vision (0:30)

13:40 Confidentiality (0:30)

14:10 Commitment (0:10)

14:20 Membership (0:05)

14:25 Leadership (0:05)

14:30 Protocol (0:10)

14:40 Meeting Structure (0:10)

14:50 Renewal (0:05)

14:55 Break (0:15)

15:10 Review of Survey Results (0:30)

15:40 Socio-grams of forum (0:20)

16:00 Long-tail life lines (1:00)

Responsible Item Preparations Materials & Supplies Time Duration

# Forum Retreat Competition Submissions

9:00	Long-tail life lines (1:30)
10:30	Break (0:10)
10:40	Constellations of families (1:20)
12:00	Prioritization (1:00)
13:30	Forum Live - Coaching (0:15)
13:45	Presentation #1 - (1:00)
13:45	Presentation #2 - (1:00)
14:55	Presentation #3 - (1:00)
15:55	Socio-grams of forum into constellations (0:35)
16:30	Forum 360 (1:00)
17:30	2013 Goal setting (0:30)

## ***Best Practices***

1. Plan and book the dates 1 year in advance.
2. Everyone **MUST** attend per constitution.
3. YPO Certified facilitator (we flew in ours from Poland).
4. Control the budget (we anonymously determine our individual maximum budget to the moderator and the lowest is the budget).
5. Incorporate learning and fun, not necessarily together.

# Forum Retreat Competition Submissions

<b><i>Retreat Name:</i></b>	<b>Zimbali Forest Retreat</b>
<b><i>Location / Venue:</i></b>	Near Durban, South Africa - Forest Suites Zimbali Hotel
<b><i># Days:</i></b>	2
<b><i>Moderator Name :</i></b>	<a href="#">Gregory Daniel</a> (WPO Durban)
<b><i>Agenda</i></b>	
Forum Agenda 28 <sup>th</sup> January 2013	
09.30am. Arrive Monday 28 <sup>th</sup> January.	
10.00am. Morning Tea	
10.15am. Opening Forum session. (Hlaza Room)	
Welcome House Matters Agenda outline	
10.30am. Ice Breaker	
11.00am. Updates and discussions	
1.00pm. Lunch (Parking Lot issues raised)	
2.00pm. Brief Life lines (15min each)	
3.00pm. Afternoon Tea	
3.15pm. Spa Treatments by the pool. (User Pay basis)	
4.00pm. Presentations (If no presentations then bonding exercise)	
6.30pm. Sundowners	
7.00pm. Dinner	
8.00pm. Social	
Tuesday 29 <sup>th</sup> January	
07.00am Morning swim at Beach Pool (Voluntary!!)	
08.00am Breakfast	
09.00am Forum forest walk –open discussions.	
10.00am. Tea	
10.15am. Forum Session (Pool side)	
Ice Breakers	

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1.00pm. Lunch

2.00pm. Forum closing session (Hlaza Room)

3.00pm. Depart Home.

***Best Practices***

Agenda should be well planned and structured to achieve set objectives. Ice breakers and Exercises specifically chosen to promote open discussion and lead on to +level 3 sharing. Private and comfortable meeting environment and venue are critical. Adventure breaks between formal sessions that all can participate in. Time keeping during sessions. Stress confidentiality at all times.

***Exercises begin on next page***

## Presencing Exercise Specifics:

"I would like to invite you to get comfortable in your chair, close your eyes, take a deep breath in ... take a another deep breath in ... and I'd like to begin by inviting you to bring awareness to your...

### **Physical Self**

- I'd like you to notice what you are feeling in your body; notice for instance whether your body is feeling
  - Dynamic and vital; robust and alive or whether it might be feeling
  - Tired and lethargic and sucked out and drawn with little energy
- There is no right or no wrong about any of this presencing we are doing with ourselves but just a noticing and awareness of what actually you are feeling
- Indeed, with your body, notice whether your body is either...
  - Feeling full from something you recently are or whether it is
  - Feeling hungry and needs to be fed
- Notice whether the body is feeling tight and contracted anywhere; in fact allow yourself to feel into your neck and your shoulders and allow yourself to just move a little bit and breath into that, releasing anything or perhaps your body is already loose and relaxed
- Remember this is no right, there is no wrong, just notice how you are feeling in your physical self

Now I would like you to shift your attention and allow your awareness to rest as your **Emotional Self**

- This is your feeling dimension of being
- Notice what you might be feeling right now
- Even in this process of experiencing this guided reflection. Notice if you are feeling
  - interested, if you are feeling alive and enthusiastic
  - Or whether you might be feeling a little board, disinterested, preoccupied with something else
- There is no right, no wrong
- Just notice what mood, what your temperament might be in this moment
- What you are feeling in your emotional self

Now I would like you to shift your attention and presence yourself as your **Intellectual Self**

- This is the side of you that is rational, reasonable, that makes meaning in a variety of ways, as it takes perspectives and positions on, often times, a lot of

# Forum Retreat Competition Submissions

topics in life, that you have a point of view about

- This is the part of you that tells yourself stories about all sorts of things, on who you are on who other people are. On what is right, what is wrong, good and bad.
- Whatever that is, whatever your noticing, whatever meaning you are making of things right now, just notice what your rational, intellectual self is experiencing

And finally, what I would like you to do is not presence yourself as what we might call your **Higher Self** or your **Spiritual Self** if that works for you

- This is the part of you that has a vision for the future, that operates from whatever you core values may be, your guiding principles
- The part of you that is moved to be an instrument of service in the world, to come from the heart with energies often times of things like gratitude, forgiveness, oneness with others,
- A sense of shared connection and meaning, recognizing that you are here with a purpose to give to others and connect at the heart

And finally what I would like you to do is attempt to presence all these dimensions of your being simultaneously

- Allow your attention and awareness to touch into your physical self, your emotional self, your intellectual self and your higher or spiritual self
- Feeling into the fullness of being as we prepare to take the next step on our journey together

## ICE BREAKERS

1. If you could have a discussion with anyone in history, who would it be been and why?
2. If you could have been told one thing that you weren't told when you were a teenager, what would you like to have heard?
3. When was the last time you called your company and pretended to be a customer?

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## Forum Update Preparation Form

Use this form to focus your thoughts

Quickly rate these aspects of your life since the last meeting? (1= lowest; 10 = highest)

**My Business:**    1    2    3    4    5    6    7    8    9    10

**My Family:**    1    2    3    4    5    6    7    8    9    10

**Me:**                1    2    3    4    5    6    7    8    9    10

	Looking Back		Looking Forward	
	Since the Last Meeting			
	<i>What increased your energy?</i>	<i>What depleted your energy?</i>	<i>What are you excited about?</i>	<i>What concerns you?</i>
<b>BUSINESS or professional activities</b>				
<b>FAMILY</b>				
<b>ME</b>				



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Based on my Update, these are the issues I would like to explore:

- |           |  |   |
|-----------|--|---|
| 1. Issue: | Feelings:                                    | Priority:                                 |
| 2. Issue: | Feelings:<br>Eg. Mad,sad,glad,scared ashamed | Priority:<br>eg. High,low.<br>Urgent, etc |

## SECTION 2: FORUM SUCCESS PRINCIPLES

### Exercise: Diversity - Finish the Phrases

1. Write the first response you think of to complete each phrase.
2. Once completed, share your responses.
3. Consider similarities as well as differences.

I think... \_\_\_\_\_

I trust... \_\_\_\_\_

I love ... \_\_\_\_\_

I doubt... \_\_\_\_\_

I fear... \_\_\_\_\_

I laugh... \_\_\_\_\_

I worry... \_\_\_\_\_

I eat... \_\_\_\_\_

I regret... \_\_\_\_\_

I see... \_\_\_\_\_

I don't... \_\_\_\_\_

I play... \_\_\_\_\_

I can... \_\_\_\_\_

Those people who think the least like me,  
can teach me the most.

## Life Line

Due to time constraints we will not have time to do a full life line on everyone. Hence the option of a shortened overview version has been included. This exercise will hopefully give all of us a better insight into our fellow forum members and help create a greater understanding of each other.

### Exercise

In 10 minutes outline the major events in your life that has resulted in the person you are today.

### Example;

An example would be to briefly cover the following points over the progression of time through your life:

Born in..... parents were..... Tough/easy ..... Upbringing.....

Schooled at .....which was a good/bad .....

Post school.....went to..... Started work at .....went onto.....

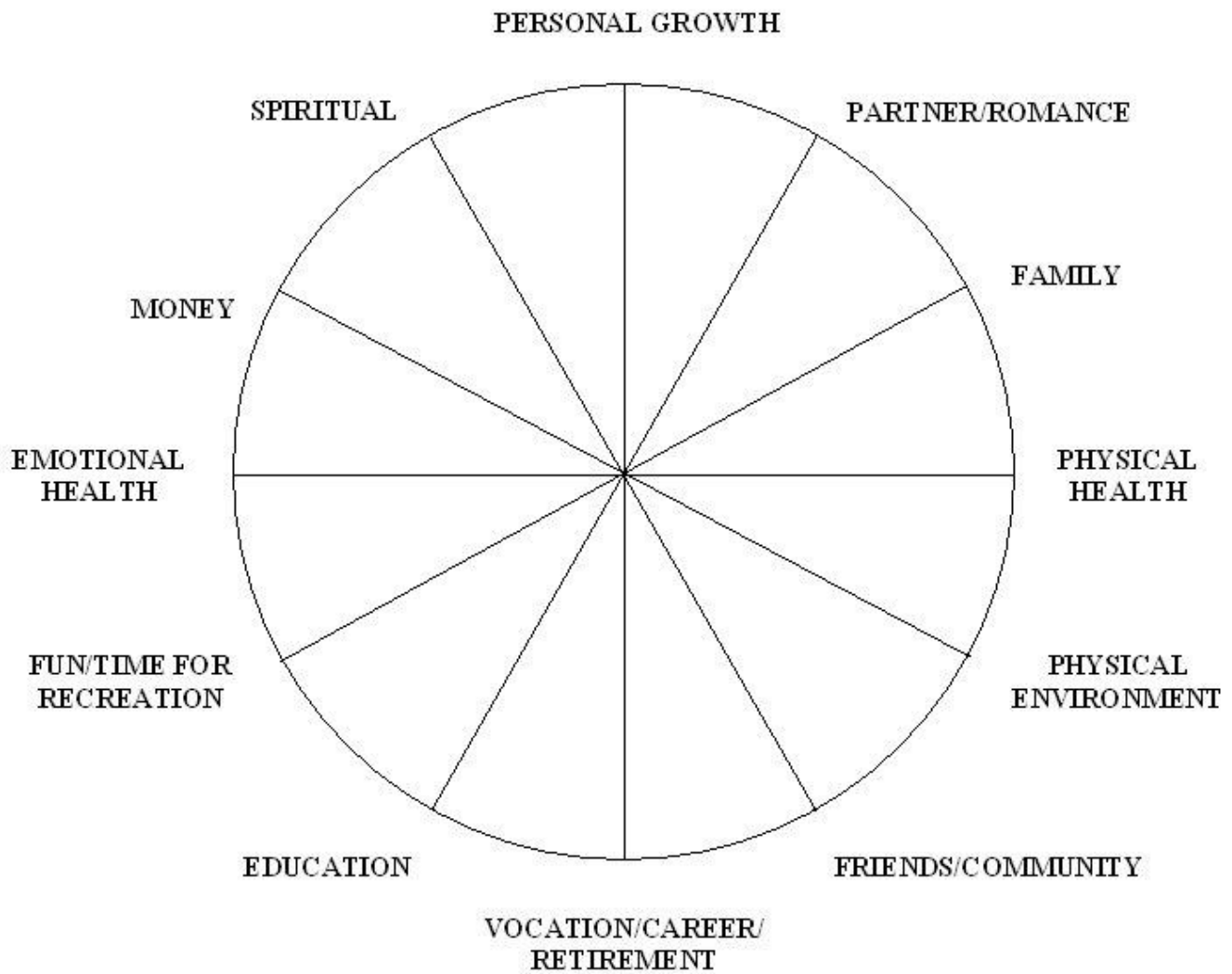
Got married.....Got divorced.....

Had kids.....challenges.....tribulations.....tragedies.....

Big challenges /breaks.....

Were I am now.....

Etc.....



**YOU KNOW MY NAME, NOT MY  
STORY. YOU'VE HEARD WHAT I'VE  
DONE, NOT WHAT I'VE BEEN  
THROUGH.**

# Forum Retreat Competition Submissions

<b><i>Retreat Name:</i></b>	<b>Aint No Mountain High Enough</b>
<b><i>Location / Venue:</i></b>	Kota Kinabalu, Malaysia - Venues locations (see below)
<b><i># Days:</i></b>	5
<b><i>Moderator Name :</i></b>	<a href="#">Virginia Reading</a> (spouse, YPO Hong Kong)
<p><b><i>Agenda</i></b></p> <p>This was a five day retreat to the island of Borneo in Malaysia. The first three days comprised travel and the ascent of Mt. Kinabalu, which at 4,095 metres is the 20th most prominent mountain peak in the world. The last two days were spent at a nearby beach resort, and it was here that the traditional retreat “content” was incorporated.</p> <p><b><i>Accommodations</i></b></p> <p>Kinabalu Park Headquarters          Laban Rata Guest House          Gaya Island Resort</p>	
<p><b><i>Best Practices</i></b></p> <ul style="list-style-type: none"> <li>- Allow members to each take up duties and contribute, to give a shared sense of responsibility in organizing the retreat.</li> <li>- Harness the group around a common goal that is tangible and achievable.</li> <li>- Be considerate of members’ limitations both perceived and real and ensure everyone feels cared for and supported.</li> <li>- Try to balance active time with “down time”.</li> <li>- Build team spirit with thoughtful touches like matching outfits.</li> <li>- Take plenty of photos to document and capture the experience!</li> </ul>	
<p><b><i>Exercises</i></b></p> <p>We incorporated a number of ice-breaker exercises during meals to help our new member get to know us better, while unveiling new information for existing members. For example, a list of 800 questions was compiled, ranging from simple to very personal. Rotating several times around the table, members rolled a cup of dice to determine which question on the list would be answered.</p> <p>Other icebreakers included a game of elimination where members held up ten fingers and in turned shared something they had never done. Members who had already had this experience had to put one finger down. The game was played until only one person has fingers up. This allowed us to reveal secrets and quirks about ourselves in a spirit of fun and laughter.</p> <p>Our core content included several exercises of increasing depth. In the first, members were to dramatize (improv or charade style) five pivotal events that changed the course of their lives. Other exercises included a worksheet examining all elements of our marital relationship, both from our own perspective and as well as how we perceive our spouses would respond. We formed pairs with a Forum partner to have intimate, non-threatening and constructive discussions. We then pledged and agreed as a group to implement a change to strengthen our marital partnerships and to hold each other accountable.</p> <p>Afterwards, we delved deeper into our lives with a classic Forum exercise featuring forgiveness. We shared situations where we have forgiven others or were forgiven, and examined whether there are people we have not forgiven and if so, why not.</p> <p>Our closing discussion was a go-around where members stated 3-5 things they learned from CHI tackling the demanding Mt.. Kinabalu climb. The finale was to identify the wisdom/take-home each of us would share with our children.</p>	

# Forum Retreat Competition Submissions

<b><i>Retreat Name:</i></b>	<b>Renewal</b>
<b><i>Location / Venue:</i></b>	Athens, Greece – St. George Lycabettus Hotel
<b><i># Days:</i></b>	3
<b><i>Moderator Name :</i></b>	<a href="#">Emin Ozgur</a> (YPO Istanbul)
<b><i>Agenda and Venue Information</i></b>	
<hr/> <p><b>HOTEL INFORMATION</b>  <b>15:30</b> St. George Lycabettus Lodging – Arrive, <a href="#">2 Kleomenous Street, 106 75 Athens, Greece</a> +30 210 7416 000</p> <hr/> <p><b>FORUM</b>  <b>16:30 to 21:00</b> Forum in the hotel. Standard updates and presentations. Survey discussion (time permitting).</p> <hr/> <p><b>DINNER</b>  <b>22:00</b> Albion Restaurant &amp; Club Restaurant , <a href="#">Omirou 6, Neo Psychiko</a>, +30 21 674-0710  <b>Albion</b>  A beautiful garden full of trees and flowers, fer forge furniture that travel you back to past decades, a bar with delicious cocktails, good music and a menu inspired by Mediterranean cuisine: Albion restaurant in the region of Psychico, knows the best recipe for offering you great nights! Taste authentic italian pizzas with thin crust, select a delicious salad from the menu's wide variety and accompany them with a special summer cocktail! In winter, have a seat at the elegant interior and enjoy the cosy atmosphere, along with a bottle of fine wine from the restaurant's small, though good, wine list!</p> <p><b>Maitre d':</b> Marios, Res under Mastorakis  <a href="http://www.estiatoria.gr/albion">http://www.estiatoria.gr/albion</a></p> <p><a href="#">Sat, Apr 20</a></p> <p><b>FORUM</b>  <b>09:30 to 12:30</b> Forum with discussion of Survey Results</p> <hr/> <p><b>LUNCH</b>  <b>With the local YPO Chapter, in Piraeus</b>  <b>13:00 to 15:00</b></p> <ul style="list-style-type: none"> <li>• Alexandre Devletoglu (Piraeus Securities)</li> <li>• George Taniskidis (ex-CEO of Millennium Bank)</li> <li>• Nasos Georgiadis (Textiles business in Thessaloniki)</li> <li>• Yannis Maskios (Refractories)</li> <li>• Yannis Soucis (Electronics Distribution)</li> </ul> <hr/> <p><b>FORUM</b>  <b>15:30 to 20:30</b> Survey results, bonding exercise</p>	

## DINNER

21:30 to 23:00

Mamacas, Persefonis 37-39, Gazi, +30 210 3470280

Res under: Mastorakis

This whitewashed restaurant started the wave of "modern neo-tavernas," which offer new takes on traditional Greek food amid the chicness of minimalist decor (think cotton-canvas tablecloths and tin accessories). Mamacas, which means "the mommies" in Greek, was also the first restaurant to spark the rebirth of Gazi, the once-forlorn neighbourhood around what was once a gas foundry. Since it opened in 1998, Mamacas has consistently offered fresh, delicious Greek and Mediterranean home cooking such as pork with prunes, tomatoes, and peppers stuffed with rice and raisins, and, when they make it, arguably the best walnut cake in town. After hours, the restaurant turns into a bar where well-known DJs regularly pick the tunes and draws a flashy crowd of miniskirted young women and open-shirted men who strike poses as if the whole world is looking. Since the long-awaited opening of the Kerameikos metro station just across the street, it's easier than ever to go to the restaurant that helped turn Gazi into the hottest spot in Athens. The eatery's roof garden was recently renovated and now hosts some of the hottest summer parties in town.

## BOUZOUKIA

24:00 till late

Athinon Arena, Antonis Remos, Pireos avenue 166, Gazi

Maitre d' : Christos Ploumidis

Athens Arena (*Athinon Arena*) is a grand music venue in [Athens, Greece](#). It is a large-scale [convention centre](#) and [concert hall](#), designed to host up to 3,000 people seated. It is owned by the [Papatheoharis Group](#). Artists featured in the Arena are [Marinella](#), [Antonis Remos](#), [Sakis Rouvas](#) and Greek superstar [Anna Vissi](#). Since 2005, it is the venue for the Greek preselection final for the Eurovision Song Contest. On September 23 and 24, 2010 the Arena was the venue for the 1st Eurovoice Music Contest, hosted by Pamela Anderson, with special guests [Sakis Rouvas](#), [Enrique Iglesias](#) and [Anastacia](#). Some of the shows hosted at The Athens Arena are: Antonis Remos 'Day+Night' (2008), Anna Vissi 'The Fabulous Show' (2009), Anna Vissi & Sakis Rouvas 'Face2Face Show' (2010)

[http://en.wikipedia.org/wiki/Antonis\\_Remos](http://en.wikipedia.org/wiki/Antonis_Remos)

Antonis Remos is one of the Top male singers in Greece. He was born in [Düsseldorf, West Germany](#).<sup>[1]</sup> He was raised there by his Greek parents, and later his family moved back to their native [Thessaloniki, Greece](#), where he finished school. During his childhood he got involved with music and learned to play guitar by himself.

After many appearances in Thessaloniki, in 1995 Antonis Remos had his first live appearance in Athens. He performed live next to famous artists, such as [Dimitris Mitropanos](#), [Stefanos Korkolis](#) and [Marios Tokas](#). This same year he signed his first contract with [Sony Music Greece](#), planning to release his first album. The first album which was released in 1996 and was titled after his name, became platinum in a few months. In April 1998 his second album, *Kairos Na Pame Parakato* ("Time to Move On") was released. For the first time, some of the most-prestigious Greek [composers](#) had given their songs to Antonis Remos, and for a second time in a row, the album gained platinum status.

In March 2000, Remos performed the title song of the movie "*I Agapi Einai Elefantas*" ("Love is an elephant") written by Minos Matsas. The soundtrack gained gold status.

# Forum Retreat Competition Submissions

Sun, Apr 21

**BRUNCH AT THE HOTEL**

**10:30 – 11:30** Short leadership exercise

**CHECKOUT and TRANSFER TO GLYFADA**

**11:30 – 12:30**

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**COFFEE in Glyfada, Ache Egomio, Kyprou 57, +30 210 8942949**

**12:30 – 13:30** Discussion of the retreat and lessons learned

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**TRANSFER TO THE AIRPORT**

**13:00 – 13:30**

***Best Practices***

Here are my best practices:

- Assign a forum meeting code officer during the discussion.
- Design specific exercises to meet specific problems the forum might have.
- Choose a location that is close and fun where networking with the local chapter is possible.
- Arrange a meeting with the local chapter, meet new YPO'ers and learn about the retreat location and business environment from an insider.
- Make sure everyone flies out and back on the same flight.
- Announce some exercises beforehand so that members can have some time to get prepared.

# Forum Retreat Competition Submissions

<b>Retreat Name:</b>	<b>Physical, Emotional &amp; Spiritual Wellness</b>
<b>Location / Venue:</b>	Grafton, Ontario – St. Anne’s Spa
<b># Days:</b>	3
<b>Moderator Name :</b>	<a href="#">Elsebeth Hansen-Kriening</a> (spouse, YPO Manitoba)
<p><b>Agenda</b></p> <p><b>FRIDAY</b>            Arrival &amp; Orientation 3:30pm            Meditation, Walk or Spa 4:00pm            Forum Dinner/Icebreakers 6:00pm            Group Activity 7:30pm</p> <p><b>SATURDAY</b>            Optional Equine Activity 7:00am            Yoga, Walk or Spa 10:15am            Lunch/Forum Meeting 11:45am-4:45pm            Meditation, Walk Horseback Riding or Spa 5:00pm            Offsite Dinner 7:30pm</p> <p><b>SUNDAY</b>            Optional Equine Activity 7:00am            Yoga, Walk or Spa 9:00am            Brunch/Forum Meeting 10:45am-3:45pm            Meditation, Walk, Horseback Riding or Spa 4:00pm            Dinner/Forum Meeting 7:00pm-10:00pm</p> <p><b>MONDAY</b>            Yoga, Walk or Spa 9:00am            Group Breakfast/Debriefing 10:30am            Check-out 12:00pm</p>	
<p><b>Best Practices</b></p> <ul style="list-style-type: none"> <li>- Free the retreat and meeting space from as many distractions as possible. This includes artwork.</li> <li>- Allow time for individuals to reflect and to process with another member or two outside of the scheduled meeting(s).</li> <li>- Incorporate physical activity and opportunities to be outdoors into the agenda.</li> <li>- Consider the use of professionals in reflexology, chakras, meditation, reiki, etc. to help clarify and/or enhance members' introspection.</li> </ul>	



# Forum Retreat Competition Submissions

<b><i>Retreat Name:</i></b>	<b>Better Satisfaction at Work, Body and Forum</b>
<b><i>Location / Venue:</i></b>	Shanghai
<b><i># Days:</i></b>	4
<b><i>Moderator Name :</i></b>	<a href="#">Adnan Akdemir</a> (YPO Istanbul)
<p><b><i>Agenda</i></b></p> <p><b>May 2</b>  Departure Istanbul at 00:35 with TK26 8 hour ;light, +5 hour time difference,  Arrival Shanghai at 15:50  Transfer to Andaz Xintandi Hotel  88 Songshan Road Shanghai, China, 200021  Tel: +86 21 2310 1234  Fax: +86 21 2310 1235  Dinner: Mr and Mrs Bund @ 20:30 (meet at the lobby at 20:15)  Introduction of Chinese Life and Culture, dinner and ice breakers.</p> <p><b>May 3</b>  Lunch: Langham Hotel, Xintandi @ 12:30  Forum exercise @ 14:30 (5 hours) at our hotel.  Dinner: Light dinner in hotel or Xintandi @ 19:00 KTV:  Departure at 20:45  Chinese Karaoke and games</p> <p><b>May 4</b>  Lunch: TBD @ 13:30  Afternoon: Introduction to a new sport for you,  Meet at hotel lobby @ 15:30  Dinner: South Beauty in Yan An Lu @ 20:30 (we will be accompanied by local YPOers)</p> <p><b>May 5</b>  We will plan the day “as we go” – lunch at the French Concession area and walking in historical parts of the town for photo opportunities and cultural exchanges.  Leave the hotel @ 20:00 to catch TK27 to Istanbul @ 22:45  Arrival to Istanbul at 5:45</p>	
<p><b><i>Best Practices</i></b></p> <p>We created a new exercise during the preparations and used multitasking to do many things at the same time. We updated forms while playing games, we did sports while trying to learn a new culture ect. Since Retreat is a very condense but short duration, combining many benefits worked out well for us.</p>	
<p><b><i>Exercises</i></b></p> <p><b>Forum Exercise:</b></p> <ol style="list-style-type: none"> <li>1 We used the ice breaker: Sharing an Embarrassing memory from Childhood.</li> <li>2 We decided to sign and renew our confidentiality contract and digitally parked it at our iCloud service. This ensured that we remind the confidentiality as well as made a record of it all over again.</li> <li>3 We have created our own game, we asked each member to fill out the Personal Profile Form below but only the bulleted yellow marked questions and started snow ball game to shuffle the papers, we opened and read the details to find out who it may be, this</li> </ol>	

has created positive energy and focus in the room. After each person tried to find the owner of the form he received. We decided to focus on the last question. Most important goal to achieve in life? Totally new and deep statements appeared on this exercise while we managed to fill the rest of the questions at the end, creating an updated Personal Profile Form for each member. We took photos and parked all forms at an iCloud service where we all have access codes. We decided to park all documentation from this point on at our iCloud library to digitize all documentation for easy reach in the future.

### YPO Forum Personal Profile Form

NOTE – Forum Confidentiality applies to this information

Date completed:

Member Name:

Age:

Birth date:

Birthplace:

Current Home(s):

1)

2)

Others:

Marital status: (List current status, prior marriage, divorce, years married, etc.)

Children: (List name(s), age, sex, birth date)

Status of extended family member (Mother, Father, In---Laws, etc.):

Religious affiliation/Spiritual:

- The last good movie I saw was:
- A book I recommend reading:
- Personal heroes/heroines:
- Your father's best lesson:
- Your mother's best lesson:
- I try to teach my children:
- A great evening for me is:
- A great skill I possess is:
- The thing I dislike most about my job is:
- The thing I like most about my job is:
- Hobbies: Vehicles owned (car(s), boat(s), plane(s), etc.):
- Most important goal to achieve in life:

**We prepared 3 exercises for the event**

**a –The Past Five Years**

**b – [Life Balance](#)**

**c- [getAbstract – The Snowball](#) (Found on the Forum micro-app)**

# Forum Retreat Competition Submissions

We have decided to pick only the last two and finalize the meeting. We prepare an extra for the preference of the group to make sure we have always new exercises. We choose to examine the Buffett strategies for work, use Tai Chi for Body, update our Forum documentation for better Forum.

## *Exercises*

**We prepared 3 exercises for the event**

**a –The Past Five Years**

**b – [Life Balance](#)**

**c- [getAbstract – The Snowball](#) (Found on the Forum micro-app)**

# Forum Retreat Competition Submissions

<b>Retreat Name:</b>	<b>Forum Fun in Florence</b>
<b>Location / Venue:</b>	Florence, Italy – Lungarno Hotel
<b># Days:</b>	3
<b>Moderator Name :</b>	<a href="#">Veronica Luccioni</a> (spouse, YPO London Mayfair)
<b>Facilitator Name:</b>	<a href="#">Estelle Doctor</a>
<b>Agenda</b>	
<i>Florence April 30- May 1</i>	
<b>Session 1: April 30</b>	
	The afternoon and early evening session will be in two parts. First we will begin by exploring the current state of the Forum, your feelings about it and about one another, and the potential the Forum has for meeting everyone's needs. Then we will focus more on personal needs, where we are and where we are going.
<b>19:30</b>	<b>Session ends</b>
<b>Session 2: May 1</b>	
<b>08:30</b>	After breakfast we will explore some of the psychological blocks that sabotage us and prevent us from making a change, reaching our potential taking the next step. This session will focus on Parts within with which we may be only slightly intimate. In the Blocks we will experiment with a strategy which will turn Blocks into supportive elements of our personalities. For those who wish to set a Goal there will be the opportunity for doing so and for finding out how the Forum can support you on your way.
<b>13:30</b>	<b>END OF FACILITATED RETREAT</b>
<b>Best Practices</b>	
<p>For us, it was so important to have a good facilitator present at retreats. We believe that as a group we are so strong and we all have the same mission for development. We are very good at being focused on our own as a group during the year in our monthly meetings. However, at the retreat, with the help of an external person, a facilitator who connects with our emotional intelligence, we were able to share more than the '10% more' asked and learned together as a Forum. Like the saying, "Location Location Location"... we felt that location did matter. To be away from the hustle and bustle of our busy life in London and to spend at least one night together definitely played a positive role in allowing us to dig deeper than our monthly Forum meeting. We all released more information, feelings and thoughts. We felt that this was crucial for the next steps forward. We showed trust and confidence in each other by allowing ourselves to let go further. Last but not least, after a productive day together we enjoyed going back to our little boutique hotel for a glass of bubbly before we headed off for a fun and light hearted evening with a deeper sense of regard and closeness for each other. A well planned and organised trip does make a difference as it keeps everyone on a similar schedule.</p>	
<b>Exercise Pre-work</b>	
Pre-work included:	
<p>Bring to the Retreat, two small and personal belongings that you already have at home. The first should represent how you feel you have contributed to the Forum, do contribute, or will contribute to the Forum in the future. The second should reflect something about your personality and it should represent something you wish to develop in yourself. At the Retreat you will have a few minutes to share why you chose the objects you did.</p> <p>Answer and let facilitator know via telephone or email before the Retreat:</p> <ol style="list-style-type: none"> <li>1. What exactly would you like to achieve for yourself and for the Forum during the training, and do</li> </ol>	

# Forum Retreat Competition Submissions

- you think that there are any obstacles to this in the Forum?
2. Key issues for discussion?
  3. Questions the group needs to deal with?
  4. The desired outcome?
  5. The state of mind we need to leave the retreat with?
  6. Also, a Retreat is a good time to clear out the cobwebs in the dark corners of the cupboard: are there any issues that you would like to discuss in Forum that are not being discussed? Are there any issues or areas of conflict that need clearing? Are you aware of any latent conflicts between members?
  7. Other topics that I am interested in exploring with my Forum, at another Retreat (such as aging parents, raising teenagers, mortality, business exit strategies etc.) are ...
  8. Our Forum would be more effective if ...
  9. I would be a more effective member of this Forum if
  10. The one key issue, that, if addressed, would help me get even more out of my Forum experience is

# Forum Retreat Competition Submissions

<b><i>Retreat Name:</i></b>	<b>The Royal Retreat</b>
<b><i>Location / Venue:</i></b>	Hyderabad, India – Falaknuma Palace
<b><i># Days:</i></b>	2
<b><i>Moderator Name :</i></b>	<a href="#">Manisha Jaitha</a> (spouse, YPO Pune)
<p><b>Agenda</b></p> <p><b>DAY 1: Thursday, August 18th</b></p> <p>Reach hotel by 11 a.m., freshen up and have lunch</p> <p>2.00 p.m. – 2.15 p.m. Welcome / Confidentiality / Assign Roles                  2.15 p.m. – 2.30 p.m. Communication starter                  2.30 p.m. – 3.30 p.m. Updates (3 to 5 minutes each concentrating on one high &amp; one low of the past month, stressing on the emotion felt)                  3.30 p.m. – 4.00 p.m. Tea &amp; Loo break                  4.00 p.m. – 5.30 p.m. Lifelines by 3 forum members based on the format emailed                  5.30 p.m. – 6.00 p.m. Forum Exercise                  6.00 p.m. Close session</p> <p><b>DAY 2: Friday, August 19th</b></p> <p>9.00 a.m. – 9.30 a.m. Communication starter                  9.30 a.m. – 11.30 a.m. 4 Lifelines                  11.30 a.m. – 1.00 a.m. Forum Exercise                  1.00 p.m. Close session</p> <p><b>DAY 3: Saturday, August 20th</b></p> <p>9.00 a.m. – 9.30 a.m. Communication starter                  9.30 a.m. – 11.00 a.m. 3 Lifelines                  11.00 a.m. – 12.30 a.m. Forum Exercises                  12.30 a.m. - 1.00 p.m. Housekeeping and Retreat close</p> <p>5 –5 –5 Factors of My Life: IN LIEU OF LIFELINES</p> <p><b>Prepare before the retreat</b></p> <p>*a) 5 Key Events in My Life                  b) 5 Key People Who Influenced Me in My Life                  c) 5 Key Choices I Made in My Life</p> <p><b>*For example,</b></p> <p>a) Events could be the birth of a first child, marriage, death of a loved one, life in a war-torn country, child-abuse, etc.                  b) People could be a parent, Nelson Mandela, English teacher, etc.                  c) Choices could be getting into your current business, joining EO, leaving a country to escape oppression, etc.</p>	

# Forum Retreat Competition Submissions

NOTE : BRINGING PHOTOGRAPHS TO HIGHLIGHT EVENTS WILL ADD VALUE THOUGH NOT MANDATORY

**Bring a brown bag with the ten most important things in your life to share with the Forum**

They could be things like:

Family –bring a picture of your family •

Business–bring a business card •

Playing golf–bring a golf ball •

Weight issues –signifies losing weight and achieving your goal •

A religious book given to you by a parent that symbolizes the values and principles instilled in you when you were growing up

An old shoe that your dog chewed up, but was his favorite toy

NOTE: MAKE A LIST OF THESE ITEMS AND PRIORITIZE THEM IN ORDER OF IMPORTANCE. SHARE FROM LEAST IMPORTANT TO MOST

Bring a favourite picture of yours and explain to the Forum why this particular picture means so much to you.

EACH MEMBER WILL GET A MAXIMUM OF THIRTY MINUTES

Please feel free to call me for any clarification.

Also, I want you all to email me by Thursday August 11th something about yourself that you're ABSOLUTELY sure no one else in the Forum knows about you. This can be something quirky, or funny, or amazing. Here are some examples:

- broke my big toe on my wedding day - spent the night in jail - accidentally closed my cat in the freezer all night (and it lived!) - won the talent competition in 3rd grade - sat next to Billy Joel on an airplane - shot a hole in my kitchen floor with a 357 magnum - owned 26 cars in the last 22 years..

***Best Practices***

Each member received a letter from their spouse (planned by the moderator) which was read out aloud to the other members. It took every one by surprise. It was a positive exposure of oneself with forum members. It was a very intimate and a high impact exercise among forum members. The lifeline exercise was also very good and structured.

## What Makes a Great Forum Retreat?

These criteria were used in judging the FY15 Forum Journey Retreat Competition. Use these as a guide when planning your next forum retreat.

<p><b>Criteria 1: The retreat agenda facilitated member integration and connectivity.</b></p> <p><i>Examples of excellence in this category may include:</i></p> <ul style="list-style-type: none"> <li>• Members stayed together in a central location.</li> <li>• An offsite activity was included in the agenda.</li> <li>• The forum had 100% attendance at the retreat.</li> <li>• Well balanced agenda – work vs. play</li> <li>• Theme &amp; agenda focused on a purpose</li> <li>• Level of risk-taking – out of comfort zone</li> </ul>
<p><b>Criteria 2: The retreat balanced work and fun.</b></p> <p><i>Examples of excellence in this category include:</i></p> <ul style="list-style-type: none"> <li>• Adding an inexpensive offsite activity to the agenda. (budget sensitivity)</li> <li>• The group used moderator-led Forum tools, such as GetAbstract for WPO Forums Exercise &amp; Discussion Guides or an icebreaker from the YPO-WPO Exchange or mobile Exchange.</li> <li>• The group included physical exercise (that challenged the group) in their retreat.</li> <li>• The group weaved forum elements into other aspects of their retreats - for example, using dine around cards at dinner or doing forum exercises while on a plane, a train or in an automobile.</li> </ul>
<p><b>Criteria 3: Members shared responsibility for the success of the retreat, without putting the full burden of planning on the Forum Moderator.</b></p>
<p><b>Criteria 4: The retreat adhered to Forum protocol.</b></p> <p><i>Examples of excellence in this category may include:</i></p> <ul style="list-style-type: none"> <li>• A safe haven was created so members felt comfortable going deeper.</li> <li>• Each shared experience became a case study that all could learn from.</li> <li>• Members accepted each other without judgment.</li> </ul>
<p><b>Criteria 5: Efforts were made to carry the retreat experience through to regular forum meetings.</b></p> <p><i>Examples of excellence in this category include:</i></p> <ul style="list-style-type: none"> <li>• The forum agreed to action steps after the forum retreat.</li> <li>• Forum members selected accountability partners with whom they could check in to assess progress toward goals.</li> <li>• The forum re-visited parking lot items that were generated from the retreat.</li> <li>• The forum developed a list of topics for their mid-year mini-retreat.</li> </ul>



FORUM

YPO  WPO

## Retreat Competition

**TOP 10**

*plus tips and best practices*

# Ain't No Mountain High Enough

TOP 5  
WINNER!

A unique blend of physical, emotional and mental challenge, this spouse Forum ascended the 4,095-meter Mt. Kinabalu and spent two days experiencing deep retreat work.

## Signatures of this retreat:

- Great mix of physical, mental and emotional work
- Getting out of your comfort zone
- Rest and renewal
- Incorporating Forum practices into various aspects of retreat

*“The climb . . . increased awareness of self and others, pushed limits, broke boundaries and increased trust in each other.”*

**Chapter:** YPO Hong Kong, spouse Forum

**Location:** Various Locations/  
Kota Kinabalu, Malaysia

**Length:** 5 Days

**Moderator:** [Virginia Reading](#)



**TOP 5  
WINNER!**

# Zimbali Forest Retreat

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Knowing they had serious work to do, this Forum spent a considerable amount of retreat time on structure, to make sure difficult issues were addressed during the time they had together.

## Signatures of this retreat:

- Mix of structure and flexibility to allow for maximum growth
- Focused on addressing an imbalance in the Forum that was threatening its productivity
- Rest and renewal
- Pushing boundaries

***“This retreat changed our relationships forever.”***

Chapter: WPO Durban

Location: Forest Suites Zimbali Hotel near Durban, South Africa

Length: 2 Days

Moderator: Greg Daniel



# Renewal

This Forum spent their retreat rebuilding trust in their 13-year-old Forum and re-centering the group on Forum protocol.

Signatures of this retreat:

- Used the [Forum Health Survey](#) to identify issues within the Forum
- Gathered ideas from counterparts via the Moderators Group on the Exchange
- Engaged with YPOers in another chapter
- Used getAbstracts for WPO Forums (found on the Forum micro-app)
- Brought lessons learned into future Forum experiences

***“This was the best retreat in content and depth of discussion as well as fun and networking with other chapters.”***

Chapter: YPO Istanbul

Location: St. George Lycabettus Hotel  
Athens, Greece

Length: 3 Days

Moderator: [Emin Ozgur](#)



# Better Satisfaction at Work, Body and Forum

TOP 5  
WINNER!

A multi-faceted retreat, members focused on finding better work habits, paying more attention to their health and addressing Forum protocol and structure.

Signatures of this retreat:

- Well-rounded, good mix of business and play
- Used [getAbstracts for WPO Forums-The Snowball](#)
- Explored another culture
- Renewed confidentiality contract
- Organized but flexible

*“It was a renewal experience with another culture as the backdrop.”*

Chapter: YPO Istanbul

Location: Andaz Xintandi Hotel  
Shanghai, China

Length: 4 Days

Moderator: Adnan Akdemir



# Muscat Forum Retreat – Integration

**TOP 5  
WINNER!**

Led by a Certified Forum Facilitator (CFF), this retreat was focused on developing a foundation, addressing dynamics and gaining knowledge.

Signatures of this great retreat:

- Exploring a new place together
- Engaging with a local chapter
- Blend of work and play
- Budget sensitivity
- Use of a CFF
- Thorough planning documents, including agenda, but also “what to bring”, background on the location and how to best prepare for the trip.

*“We are much closer and appreciative of each others' cultural and ethnic backgrounds, especially given our diverse Forum.”*

**Chapter:** YPO Johannesburg Golden City

**Location:** Al Bustan Palace Hotel  
Muscat, Oman

**Length:** 4 Days

**Moderator:** Salim Dewji

**Certified Forum Facilitator:** Ken Tyler



# Physical, Emotional and Spiritual Wellness

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Affected by upheaval in the recent past with membership, commitment and trust, this spouse Forum focused their retreat on “rebirth”.

## Signatures of this retreat:

- Focused on group and individual reflection
- Blended physical, emotional and spiritual growth
- Gained deeper insight and union
- Blend of fun and deep work
- Growth continued throughout all aspects of the retreat: Forum work, spa visits, meals
- Thorough planning documents, including agenda, but also “what to bring”, background on the location and how to best prepare for the trip.

*“Allowed us to gain a level of insight and union that we have not been able to achieve previously.”*

**Chapter:** YPO Manitoba, spouse Forum

**Location:** St. Anne’s Spa  
Grafton, Ontario

**Length:** 3 Days

**Moderator:** Elsebeth Hansen-Kriening



# Forum Fun in Florence

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Led by a Certified Forum Facilitator (CFF), this retreat was focused on encouraging each Forum member to explore out of their comfort zone.

## Signatures of this retreat:

- Group Forum reflection
- Conversation about the future of the Forum
- Use of a CFF
- Pushed selves more than 10% out of comfort zone
- Blend of deep work and fun

***“We all released and shared feelings, emotions and thoughts, which further helped us reach new levels of engagement.”***

**Chapter:** YPO London Mayfair, spouse Forum

**Location:** Lungarno Hotel  
Florence, Italy

**Length:** 3 days

**Moderator:** Veronica Luccioni

**Certified Forum Facilitator:** Estelle Doctor





# Executive's Cup

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This Forum reached new levels of depth and trust in this Certified Forum Facilitator (CFF)-led retreat.

Signatures of this retreat:

- Blend of deep work, fun and physical activity
- Use of a CFF
- Housed together to increased the group sharing atmosphere
- Focus on future planning for the Forum
- Budget sensitivity

***“Our retreat was filled with new levels of depth and learning and shared experiences.”***

Chapter: YPO Windy City

Location: San Francisco, CA

Length: 3 Days

Moderator: Laura Neiman

Certified Forum

Facilitator: Sue Hesse



# Forum 5 in San Diego

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This mostly new Forum used their certified Forum Facilitator (CFF)-led retreat as a kick-off, focusing on establishing Forum norms, goals and identifying their culture.

Signatures of this retreat:

- Use of a CFF
- Using a retreat to welcome new members and re-focus the Forum
- Unique and challenging group off-site (*at the Navy SEAL base*)
- Group planning effort
- Addition of an issues-clearing component

***“The facilitated portion of the retreat set the right tone and allowed us to focus on how we could become a high-performing Forum.”***

Chapter: YPO Santa Monica Bay

Location: San Diego, CA

Private Home

Length: 3 Days

Moderator: James Edwards

Certified

Forum Facilitator: Sue Hesse



# The Royal Retreat

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This retreat focused on totally disconnecting from the “every day” so the Forum could go deep and learn about themselves and others.

## Signatures of this retreat:

- Exploring a new place together
- Bonding and deep Forum discovery
- Blend of work and play
- Moderator engaged Forum members’ husbands and partners in preparation for the retreat (Can be powerful, but not appropriate for every Forum.)
- Advance preparation by entire Forum

***“This retreat took our Forum to another level and, as a result, it became a solid unit.”***

**Chapter:** YPO Pune, spouse Forum

**Location:** Falaknuma Palace  
Hyderabad, India

**Length:** 2 Days

**Moderator:** Manisha Jaitha



# Ideas and Best Practices

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## **Download tips and best practices for information on:**

- Planning and agendas
- Logistics and location
- Connecting with local chapters
- Encouraging stepping out of the comfort zone
- Creating Balance
- Exercises Ideas

[\*Download one document with all retreat agendas and details.\*](#)

FORUM

YPO  WPO

[ForumHelp@ypowpo.org](mailto:ForumHelp@ypowpo.org)

# 2015 Forum Journey Retreat Competition winners

REGION
<a href="#"><u>Africa</u></a>
<a href="#"><u>Canada</u></a>
<a href="#"><u>East Central</u></a>
<a href="#"><u>Europe</u></a>
<a href="#"><u>Latin America</u></a>
<a href="#"><u>MENA</u></a>
<a href="#"><u>NEUS</u></a>
<a href="#"><u>North Asia</u></a>
<a href="#"><u>Pacific</u></a>
<a href="#"><u>Southeast US and Caribbean</u></a>
<a href="#"><u>South Asia</u></a>
<a href="#"><u>Southeast Asia</u></a>
<a href="#"><u>Western</u></a>
<a href="#"><u>Network Forums</u></a>

# Forum Retreat Competition Submissions

<b>Region: Africa – runner-up</b>	
<b>Retreat Name:</b>	<b>Xing Retreat 2014/ Best Things in Life</b>
<b>Location / Venue:</b>	Dubai
<b># Days:</b>	5
<b>Moderator Name :</b>	Imrana Nesbitt
<b>Facilitator Name:</b>	n/a
<b>Chapter:</b>	WPO Nairobi

## **Attachments**

[https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/DDlwsiekPow%3D/xing\\_retreat\\_dubai\\_program.docx](https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/DDlwsiekPow%3D/xing_retreat_dubai_program.docx)

## **Statement:**

The theme was the best things in life and we were all set to learn, experience and enjoy the best things on our first international retreat. Forum members were asked if they would like fast paced or relaxed activities and or any other retreat preferences. This information was used by two members to plan the retreat. While the location was known by all, all other details were revealed to the members each morning. Every member still had a role to play managing exercises, preparing reflections as well as the regular roles of scribe, processor and time keeper.

Each morning began with a different forum member giving a reflection in whichever way they saw fit on the day's theme. Music was an important aspect and theme based music played in the background and there were many singing breaks. Forum work was done in the mornings and fun activities in the afternoons. The exercises focused on bringing us together as a group, conflict resolution, personal growth and encouraging each other to be the best we can be. Privacy, confidentiality, respect, meeting members' individual needs, were all adhered to.

Day 1 - Theme Harmony Focus - clearing any issues in the group. Exercises allowed us to see what works and what could be improved through the eyes of the other forum members. We had some areas of conflict which were dealt with. The desert safari in the afternoon helped smooth any uneasiness we had from the morning exercise.

Day 2- Theme The Best Things in life Focus - where does the forum stand and where do we want to be. (Norms and Health check) The afternoon activities took most out of their comfort zones (swimming, touching dolphins, zip lining) and confronting some fears (heights). Most importantly no one was left behind – with encouragement and support everyone did everything.

Day 3 - Theme Joy Focus – what do we value and why. Afternoon listening to a selected playlist as we sailed round Dubai in a yacht laughing and singing.

# Forum Retreat Competition Submissions



Day 4- Theme Happiness Focus - trying new things – driving Formula 1 race cars and learning to pole dance. In the evening an exercise what goes around allowed us to share the up, downs and challenges of our individual lives. Final Theme Abundance A reflection on abundance was done in Nairobi after our return at a forum meeting. It was an opportunity to see where we are and to relive some the retreat memories. By the end of the retreat every member had been in a couple situations or conversations that took them out of their comfort zone and had successfully faced the challenge. Everyone had a few 'never done before' experiences and the general feeling was one of sisterhood and feeling blessed with love, joy & harmony. Goals were set and a review of these, as well as a review on the reflections was done on return and at various times in the course of the year



# Forum Retreat Competition Submissions

<b>Region: Africa</b>	
<b>Retreat Name:</b>	<b>Over the Top!</b>
<b>Location / Venue:</b>	Reunion Island Piton des Neiges (Snow Peak)
<b># Days:</b>	2.5
<b>Moderator Name :</b>	Philippe Meliet
<b>Facilitator Name:</b>	n/a
<b>Chapter:</b>	WPO Mauritius

## Attachments

<https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/on9zxPnqnc%3D/forumretreatmauritiuschapter.pdf>

## Statement:

7 peer-forum, memorable retreat, out of comfort zone.

Over a week-end: Forum learning and growth as a group, fun, and stepping to the extra-mile...

Threefold target: - Detach from everyday stress - Build moments of truth - Have fun

Activity: to walk to the top of the highest mountain peak of the Indian Ocean.

Snow Peak is a massive 3,069 m shield volcano on Reunion Island. All of us stepped in.

PRE-WORK 6-month training with personal coaching, careful selection of equipment, pre-bookings and B-plans. To spice up the event, we had planned this retreat on the same days as the famous yearly ironman competition (additional security measures, medical assistance along the way).

DAY 1 On flight, each of us was asked to share one important long term strategic issue, never ever mentioned before in our forum. After the transfer to our 4star hotel in the valley, we started with a 5-hour Forum Workshop. Ice breaker, 1 hour to review the way our forum was working, constitution and rules and two never-discussed-before topics were selected and debated.

Day 2 Solid breakfast, in-depth briefing on our experience with our guides. The initial plan was a 5 hour-hike... It nevertheless lasted 7 hours, since achieving a 1700m elevation revealed to be somewhat more tricky and demanding than forecasted... We stopped at a mountain hut and had a basic but re-energizing local diner... we shared a slightly heated dormitory.

Day 3 3:30am start off for the last bit of the remaining ascent. Under the light of torches, in a perfect silence, alone, our group proceeded, enjoying the magnificent sunrise on the mountains. An absolutely incredible and fabulous experience... our island Mauritius was visible 200km-away. We all thought the way down was to be easier... With aching knees and feet we were back to the village for lunch and for a last rich Forum debrief all together in the hot springs! Next forum, we shared our pictures, remembered with fun all the physical pains we had had to overcome, and the fantastic group dynamic we all put in motion to make it all together. Not one of us was left behind. We have managed to reinforce to the

## Forum Retreat Competition Submissions



utmost our solidarity feeling. We took home and addressed also the 5 other issues from our Retreat. We deliberately put ourselves in a situation where each member gave its commitment to the Group: to participate, be there, train beforehand, help each other, accept to be vulnerable and be helped. Beyond the 'formal' Forum, we had time to interact deeply with each other, establishing thus greater connectivity. All these new assets in the forum are lasting even now and for long. On a personal level walking 15 hours gave us time for introspection... without mobile phones, surrounded by a strong and beautiful nature, overcoming physical and mental barriers, we realized that we had to re-baptize our retreat from "To the top" to "Over the top". We overcame our fears as a group. Yes, we DIT IT!

# Forum Retreat Competition Submissions

<b>Region: Canada</b>	
<b>Retreat Name:</b>	<b>Shake It Up</b>
<b>Location / Venue:</b>	Miraval Wellness Spa, Tucson, Arizona
<b># Days:</b>	4
<b>Moderator Name :</b>	Debra Van der lee
<b>Facilitator Name:</b>	n/a
<b>Chapter:</b>	YPO British Columbia

## **Attachments:**

[https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqjca/7ivsiAzCbPA%3D/miraval\\_retreat\\_april\\_2014.doc](https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqjca/7ivsiAzCbPA%3D/miraval_retreat_april_2014.doc)

## **Statement**

Our Forum, also known as “The Black Dogs” celebrated 15 years of being together in 2014. Our Forum selected and planned a spectacular 4 Day Retreat at the Miraval Wellness Spa in Tucson, Arizona. Set against the Santa Catalina Mountains in the High Sonoran Desert, Miraval is special place where individuals go to discover and create overall well-being and awareness of one’s self. You will see a copy of our Retreat agenda attached. It includes a perfect balance of activities which created the perfect environment for Forum Intimacy, and Bonding: meetings, fun activities, free time, social time and personal discovery/exploration through new experiences. Our deep Forum work was experienced through 3 private Sessions.

On Day 1 the Retreat masters organized our Opening Ceremony Session with Tony Redhouse who is a Native America Healer and Musician. Tony uses an ancient form of Native American expression including chants, flutes, and drums to invoke a deep sense of peace. Our Forum then participated in a “Talking Circle”. In traditional Native American communities, the members would assemble in a circle to discuss issues affecting the tribe. The Eagle feather is passed to each person allowing them to share their thoughts and ideas while the others in the circle listened respectfully. The Circle is a way to practice balancing skills of talking and listening. Each participant will have the opportunity to hold the Eagle feather and express their hopes and thoughts about their life in a non-judgmental and healing environment. On Day 2 - Our next private Forum Session was with Wyatt Webb (author of: “It’s not about the Horse”) who is the founder of the Equine experience where horses help you release blocks in your life. But instead of riding a horse on this inner-life journey, we groomed them. Through this experience, the horse, by its compliance or its resistance, becomes an energetic mirror that helps identify patterns of behavior that detract from finding happiness. The safe and supporting experience allowed each member to clear fear and self-doubt. Day 3 – on our last full day our Forum participated in the “Swing and a Prayer”. Each Forum member will take turns being hoisted 35 feet in the air and asked to let go of a rope so they swing like a big pendulum. This challenge is about teamwork, trust, support, facing fears and letting go. While each person took their turn, there was a job to do on the

## Forum Retreat Competition Submissions



ground. Hauling a ladder in for the climber, “spotting” the climber as they go up the ladder to be attached to a cable and then the Group pulling on the rope to hoist them up to the highest point. We coached and supported each other along the way even when sheer fear took over. Just before each person would let go of the rope, they would declare and share something they want to let go of in their life. This was truly the most amazing team building experience we’ve ever had as a Forum.

# Forum Retreat Competition Submissions

<b>Region: East Central</b>	
<b>Retreat Name:</b>	<b>Finishing Well</b>
<b>Location / Venue:</b>	Palm Springs, CA, Big Horn - private country club and residence
<b># Days:</b>	3
<b>Moderator Name :</b>	George "Bud" Arquilla III
<b>Facilitator Name:</b>	n/a
<b>Chapter:</b>	WPO Chicago

## **Attachments:**

<https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/neU2AyKhmpU%3D/bud.pdf>

## **Statements**

Our "Naples Forum" of the Chicago WPO Chapter was formed 15 years ago. Since inception, we have had 2 of our members die unexpectedly from heart attacks. As we discussed our next retreat program and with a current average age of about 65, we thought that it would be appropriate that we should take up the so called "end of life" issues. As is typical, we distributed planning duties; 2 members would develop the topic (topic) and 2 would plan the activities (activities). For five months before the retreat and in order to set the stage for this "difficult" subject matter, the topic team brought outside resources into the ongoing monthly meetings. These included a rabbi, pastor and palliative care expert. Reading matter was distributed and assigned, e.g., "Finishing Well" by fellow WPOer Bob Buford and "Being Mortal" by Atul Gawande.

Since most members had already developed and established their wills and trusts, etc. the focus was not upon the "paperwork" aspect of the subject matter, but rather, on what one should rightfully contemplate in order to have considered one's life well lived. Prior to the retreat, one topic member created a book review of "Finishing Well" and developed a list of key "wisdom points" and questions each member might consider regarding his own life, and how he might want to live it out "well." The author had coined a phrase for this; moving from "Success to Significance" in one's life. For the retreat, the topic team created 4 creative exercises.

Photo banners (#1 attached) were created to reflect 3 of the topics: 1) An appreciation of our past forum experiences together, and look into the future, 2) A personal expression of what you would do if you only had 3 months to live, and 3) Everyone selected a random fortune cookie with one of 3 "fortunes." For the rest of your life you will either; live for 20 years healthy and unfettered, a close loved one will develop a long term chronic illness which will affect you on a daily basis, or you will develop a long term chronic illness until your death. Each was given 24 hours to contemplate their response to the group the following day.

A fortune cookie exercise as a metaphor for the uncertainty that tomorrow might bring! Finally, each member was given an opportunity to "report out" and share their key learning experiences over the

## Forum Retreat Competition Submissions



past 5 months before and during the retreat...on commencing their personal journey from Success to Significance. We concluded with a personal conference call with Bob Buford. The activities team did not disappoint and organized fabulous events, including: a 3 mile “expert escorted” hike in the desert mountains, golf, box seats at the Paribas Open Professional Tennis Tournament, an architectural tour of 1950’s Palm Springs architecture in addition to gourmet dinners and wine. This was a rightful and perfect retreat exercise for a mature WPO forum group. Respectfully submitted, George “Bud” Arquilla III Moderator, 2013-2015.

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# Forum Retreat Competition Submissions



# Forum Retreat Competition Submissions



<b>Region: Europe</b>	
<b>Retreat Name:</b>	<b>Have Fun and Bring Forum to a Higher Level</b>
<b>Location / Venue:</b>	Miami, Fisher Island and 56 foot boat
<b># Days:</b>	2
<b>Moderator Name :</b>	Samir Kayali
<b>Facilitator Name:</b>	N/A
<b>Chapter:</b>	YPO Madrid

**Attachments:**

[https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/5LJCHJv4j8%3D/agenda\\_retiro\\_f1\\_miami\\_2015.docx](https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/5LJCHJv4j8%3D/agenda_retiro_f1_miami_2015.docx)

**Statement**

We have been running as a forum for over 10 years, and after the last forum survey in which we had a worse result than last year, we decided to take our forum to a higher level. We wanted to design a different style of retreat and make it touching and moving. The experience of organizing the retreat on a boat was very positive; we had a lot of involvement, closeness and openness despite the limited space and the presence of the crew. They were never in our workspace and we felt confident.

1. We started with an issue clearing exercise for an hour, allowing us to clean any issues and start fresh. We worked on our vision as a forum, identifying our strengths and how to keep up with them. Mandala’s exercise allowed us to focus in the year 2018 and from there, understand how our forum will be, what we had learned, what we had dropped, and what gives us energy. We performed a relaxation exercise in the water on a paddle board. The challenge was to go back to the boat (simulating the boat was our forum in 2018). We stuck together working as a team and completed the challenge. After on our nautical lounge we shared the experiences, learnings and fears we will deal with up to 2018. We continued working on identifying the key milestones, actions, responsibilities and deadlines. Working our vision as a team led us to a deeper level of commitment and trust within the group.
2. We tried to have a good mix of work and enjoyment. We worked hard for two days, but also had our moments of fun. We enjoyed the best restaurants, had good drinks on the boat, and bathed in the waters of Miami... The partners also joined us. They had their own program. We met the night before the Retreat, and once completed we enjoyed the weekend together.
3. Three members organized the retreat and shared the program with the rest of the forum. During the retreat each member had some responsibility, such as facilitator, time keeper, treasurer... We added some innovative Officers positions: Philanthropic, Diversity, Innovation, Protocol & Fun.
4. On day two, we worked on a deep update identifying the presentations for the coming months and updating the parking lot. We reviewed the forum rules and update the basis of the forum. We also



## Forum Retreat Competition Submissions



designated the next two moderators and we scheduled our first mini-retreat and the next retreat. We ended up sharing our emotions towards the retreat. Everyone agreed it was the best retreat we have ever had.

5. We will introduce some best practices (four steps, mini-retreat), governance plan metrics, quarterly fun activities and innovative exercises twice a year. We have also decided to participate in a charity project to keep us united, and contribute to make the world a little better. Our claim will be: "We improve ourselves and improve the world" which will be printed in T-shirts for us to wear

# Forum Retreat Competition Submissions



# Forum Retreat Competition Submissions



<b>Region: Latin America</b>	
<b>Retreat Name:</b>	<b>How Fear Impacts Our Life Choices</b>
<b>Location / Venue:</b>	North Carolina - Rock Climbing in the Mountains of Western North Carolina
<b># Days:</b>	2 days of work/4 total
<b>Moderator Name :</b>	David Bogaty
<b>Facilitator Name:</b>	Matt Walker
<b>Chapter:</b>	YPO Puerto Rico

## Statement

We began by performing an exercise that helped each of us zero in on our 10 most sacred values in life. We then explored how fear gets in our way of living them. the invitation was to explore whether we are really living our values and to what degree fear causes us to deviate. the next day, after a little practice, we proceeded to climb a 500 foot mountain. Only one of us had any rock climbing experience at all. We faced fear almost to the point of paralysis but it forced each of us to consciously confront how we react when gripped by it. We then felt the experience of accomplishing our goal and overcoming fear when we reached the top. It was a feeling of group and individual euphoria. Finally, we finished with a group exploration and sharing of how fear impacted us both physically and psychologically. One in our group summarized it great when he said "It's a total mind F \_\_\_\_. You know you can do it physically but fear plays on your mind to convince you that you can't"

A beautiful benefit was that in order to accomplish it as a group we really needed to support each other through the fear. We learned that some need encouragement and others need to be challenged. Without the group support, we may not have been able to accomplish it. It forced vulnerability and greatly raised our level intimacy with each other. During the sharing we lived the principles of Transformational Forum. We were vulnerable, emotional and self curious about the emotional and practical impact of fear.

We built the environment by conducting a grounding, and insuring confidentiality. All phones were off. Since we are a Transformational forum, the vulnerability was met with vulnerability which increased the feelings of safety to maximize personal learning. As far as continuation, though we did not set up a follow up structure, this retreat has left an indelible memory of how each of us responds to fear. It has made unconscious and perhaps limiting behavior conscious. We draw strength by reminding each other of the positive way we reacted, and we have become more aware of and vigilant to overcome the barriers fear puts in our way. The lessons have remained valuable tools when we each face fear in our personal and professional lives and they have assisted us to choose healthier paths more consciously



# Forum Retreat Competition Submissions

<b>Region: MENA</b>	
<b>Retreat Name:</b>	<b>Desert Roses Renaissance</b>
<b>Location / Venue:</b>	Budapest, Hungary
<b># Days:</b>	4
<b>Moderator Name :</b>	Annette Patel
<b>Facilitator Name:</b>	
<b>Chapter:</b>	YPO Emirates

## **Attachment**

<https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqjca/C4iflhyQB00%3D/desertrosesretreat.pdf>

## **Statement**

Diverse is the best word to describe the Desert Roses Spouse Forum! By way of background, the Desert Roses Forum comprises 8 spouses holding 7 nationalities, speaking 5 languages and having 4 different faiths. After the instability of the departure of a member and the rejoining of a former member in late 2014, the Desert Roses realized that their new constellation needed a SuperCharge and a special retreat for the health and wellbeing of the Forum.

An urgently organized health survey disclosed some valid concerns. An experienced resource was brought in and a SuperCharge conducted. A training on new Forum practices (FSFE) formed a part of the training as did a clearing of the air to allow members to open up and reach levels of trust. The outcomes shaped the tone of the upcoming retreat. The Roses looked for a city that none of them had visited and that had easy connections, was within a reasonable budget for all and that contained culture, art, history and food. They came up with Budapest! Europe's best kept secret. To ensure shared responsibility, a small organizing committee of the Roses was formed. A great agenda was finalized ensuring that there was something for everyone and including mental, physical and emotional elements, copy attached.

The hotel was central and overlooked the picturesque city of Budapest allowing the Roses to walk to most of the destinations. Forum was integral to each day making sure to use the new practices demonstrated at the SuperCharge. Forum exercises such as the un-game, Forum picture cards, the life box, as well as ice breaker exercises sprinkled throughout the retreat etc. were used and stretched everyone to open up and share. This allowed the Roses to reach new levels with one another. Members were even stretched beyond their comfort zone in some creative exercises, most notably a tour of Budapest in the old Hungarian cars the Trabant and a visit to the historic Gellert Thermal Baths.

The local flavor of the city was never forgotten with local restaurants, local wines and local culture and history. Every part of the trip was carefully planned to fulfil its primary objectives of deeper understanding, better integration and deeper exploration and trust building. As leaving mementos, every Rose received a rose, a charity made bracelet and a personalized small tray. Every Rose rated the retreat as a 10 out of 10. Every Rose unanimously agreed it to be the best retreat in terms of the

## Forum Retreat Competition Submissions



location and sights but also in terms of reaching a deeper understanding between the members. Upon return, the Roses have all felt that the Forum is a true Phoenix rising from the ashes with more meaningful Forums where members are more open and willing to share and reach new levels. The Roses have continued to use the new Forum protocols and have enjoyed the experience. The Roses are today stronger and healthier than ever thanks to the Best of the Best Retreat in Budapest.

# Forum Retreat Competition Submissions

<b>Region: NEUS</b>	
<b>Retreat Name:</b>	<b>Iceland Retreat</b>
<b>Location / Venue:</b>	Reykjavik and other locations in Iceland
<b># Days:</b>	4
<b>Moderator Name :</b>	Perry Steiner
<b>Facilitator Name:</b>	Craig Wiley
<b>Chapter:</b>	YPO Washington D.C.

## Attachment

[https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/xUzhQMwKLNU%3D/iceland\\_itinerary\\_final.docx](https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/xUzhQMwKLNU%3D/iceland_itinerary_final.docx)

## Statement

Our forum held a spectacular retreat in May 2014 in Iceland that was by far our best retreat. There are four reasons this retreat still stands out for all of us: linkage to our work across the Forum year, integration of forum work and incredible activities and settings, deep and meaningful sharing through effective facilitation, and a fantastic time in an amazing country.

First, we set our goal as a Forum for the 2013-14 year to each design and make progress against individual “life plans”. We enlisted Craig Wiley, an outstanding facilitator, to work with us across the year, and we set a schedule where each member would develop a life plan, get coaching from Craig and another forum member, and then present the plan in a forum meeting. By the retreat, we all had presented life plans, and thus did facilitated exercises focused on embedding the life plans in our lives going forward. It was a tremendously powerful experience and one that had immense positive impact on each of our lives and how important Forum is in them.

Second, we designed the retreat to maximize important facilitated time and maximize adventure and fun, and thus conducted our exercises in amazing settings. For example, we held a forum meeting on top of the largest glacier in Iceland (the enormity of the glacier and the beauty of the setting enhanced the emotional connection). We did a forum exercise at the bottom of a cave where it was entirely pitch-black (creating an ideal setting for deep reflection and listening to others without being able to judge facial expressions). And we pushed ourselves past the comfort zone by snorkeling in freezing water at the divide of 2 continents and then reflecting on the emotions raised for us (ranging from fear to love to pride).

Third, Craig was highly effective in his role and pushed us to ensure we met our goals for the retreat. Because we had all worked with him through the year, we had a shared comfort with him by the time the retreat came, and he attended all the activities with us, pushing us when appropriate to focus our minds on the exercises and to appreciate the incredible natural setting around our important forum work. The depth of our connection through this work was as high as we have ever had. Finally, Iceland

## Forum Retreat Competition Submissions



is a land of tremendous natural beauty, and it presented the perfect blend of awe-inspiring settings, adventure, and fun. We had a blast on all the adventures, pushed ourselves beyond the comfort zone, had some great meals together, and came home with the kind of inspiration and excitement and clarity about the path forward that we all strive to achieve in Forum. We moved to Transformational Forum this year as a result of our incredible experience and the closeness we felt from the Iceland retreat – we wanted to springboard off that momentum to go even deeper. We can't imagine having a better overall retreat experience.

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# Forum Retreat Competition Submissions

<b>Region: North Asia</b>	
<b>Retreat Name:</b>	<b>Legacy Forum's April 2013 forum retreat</b>
<b>Location / Venue:</b>	The Farm at San Benito and Manila, Philippines
<b># Days:</b>	4
<b>Moderator Name :</b>	Paul Tao
<b>Facilitator Name:</b>	N/A
<b>Chapter:</b>	YPO Hong Kong

## **Attachment**

[https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/IEKilBcxegw%3D/legacy\\_forum\\_april\\_2013.zip](https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/IEKilBcxegw%3D/legacy_forum_april_2013.zip)

## **Statement**

This forum retreat in April 2013, chaired by Jessie Ng and under the moderatorship of James Gagne was the 1st full retreat of Legacy Forum which was recently formed in 2011. A new member just joined the forum and it was an ideal integration exercise for him and for the other members of this new forum to dive deeper into understanding each other. The exercises we did were quite typical of a new forum: Lifelines; Getting to know you; Legacy issues: what do you want your children to remember about you, family values, meaningful personal possessions.

There was 1 full forum meeting followed by 3 meetings doing the exercises, all at The Farm at San Benito, a remote health resort in the Philippines. But more significantly were 2 impromptu presentations done by 2 members arising out of updates and the exercises above that had a resounding impact not only on the individuals but also other forum members. One presentation was originally on another topic but the coach spotted the elephant on the table and persuaded the presenter to change the topic.

Their impact still reverberates today. Had it not been for this calm venue and ample time during the retreat to allow us to focus on our emotions, these 2 important presentations may not have surfaced. All forum protocols were adhered to, everyone was punctual, and the roles of coaching, timekeeper, processor, scribe distributed. The Farm only served vegan food which was mainly raw and this was out of the comfort zone for our meat eating forum members. We had some other leisure activities at The Farm: - a tour to see how they made all their soap and oils in-house from coconuts - a tour of the unspoilt grounds of the resort and the tiny rural village nearby - spa treatments and swimming.

Part 2 of the retreat was an afternoon in Manila with a charity group. This was arranged by James Gagne and a huge contrast to the luxury resort. We were transported to a crowded orphanage in a poor part of the city and participated in a distribution program to the orphans of Gifts in a Shoebox/Operation Christmas Children. There was a tour around the centre and watching the many children line up and open their gifts was a moving experience. In the evening, we were given a talk by

## Forum Retreat Competition Submissions



the CCT Group of Ministries about some of the help they try to bring to the street dwellers, children and youth, in the toughest urban and rural areas of the Philippines. Most memorable is how they managed to change the outlook of some of their most difficult and violent subjects so they became their evangelists and co-workers. This exposure has kept our members thinking about how to raise our own children to recognise that they have had great privileges and how we should try to give back to society. That thought and that theme continues to be an important part of our forum

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# Forum Retreat Competition Submissions



<b>Region: Pacific</b>	
<b>Retreat Name:</b>	<b>The French Connection</b>
<b>Location / Venue:</b>	Montreal, Quebec, Canada
<b># Days:</b>	4
<b>Moderator Name :</b>	Ivette Moses
<b>Facilitator Name:</b>	n/a
<b>Chapter:</b>	YPO Orange County

## Statement

Together since 2004, we wanted a retreat experience outside of the United States. Montreal was a perfect location. We loved the European feel of this French Canadian city. Since our group had established a deep trust and a solid foundation throughout our years together, we were ready to delve into deep vulnerability and challenge ourselves to go outside our comfort zone via forum group exercises, while also sightseeing and enjoying the food of Montreal and still leaving time of course, for lots of fun.

THURSDAY-Arrival/Dinner at a local restaurant.

FRIDAY- Morning- Reviewed FORUM SURVEYS focusing on strengths and weaknesses regarding structure. Together we recreated, committed to, and signed "FORUM NORMS." 2 Hour exercise- "PHYSICAL REPRESENTATIONS OF YOUR LIFE STAGES"- Each member brought 5 significant items that represented themselves at different phases of their life. Everyone spoke about the object's importance in that period of their life. Deeper selves were revealed. Deep self-reflection occurred. Items were private and symbolic. LUNCH- Dim Sum. We experimented with several new foods and discussed past retreats. AFTERNOON- Bike Rental(1 hour) touring old Montreal, Carriage rides through the city. Afternoon Tea-St James Hotel. Dinner- A chic local Restaurant/Bar with great nightlife. Carefree/Fun time is critical to the group.

SATURDAY- 2 Hour Deep Dive- "Letter To A Loved One" All members pre-wrote then shared a letter to someone special as if they were going to be "gone" for a few years. The letters revealed wisdom, lessons and thoughts that they wanted this person to draw upon while they were away. This exercise was deeply emotional and required great thought. The forum stretched itself, first putting words onto paper then being emotionally present for the reading which stirred deep emotions. Lunch- Italian eatery where we discovered the famous, "Bloody Caesar". Dinner- Authentic French Restaurant-The French speaking staff provided tons of laughter and playful banter back and forth. We then headed to an "Underground Club" experience which was a first for all of us.

SUNDAY- "Transparency Tiles"- cut square plastic tiles with different gradations of transparency, ( opaque translucent & transparent). These were physical, material representations, symbolic of our commitment to the forum process. We were asked to select one tile to represent our transparency, and another for the transparency level of each member of the group. This really urged the forum participant

## Forum Retreat Competition Submissions



to examine their own level of vulnerability, openness, and of course transparency. The forum member who was doing the sharing/talking had to dig deep to examine themselves and their level of commitment to total candor and openness. The member sharing was also aware that the other members have been listening to their updates for many years and were going to make their own evaluation of that person's level of sharing. The effect this had on our group was profound. There were tears, risk taking and realizations occurring. There was a feeling afterwards of being pushed through to another level, being urged to grow and trust. AFTERNOON- Lunch in the hotel room and departures.

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# Forum Retreat Competition Submissions



<b>Region: SEC</b>	
<b>Retreat Name:</b>	<b>Couple Retreat and Reboot</b>
<b>Location / Venue:</b>	"The Roost" in Clarksdale, MS
<b># Days:</b>	4
<b>Moderator Name :</b>	Jennifer Young
<b>Facilitator Name:</b>	DeLynn Copley
<b>Chapter:</b>	YPO Southern 7

## Statement

Our spouse forum has been together for 6 years. DeLynn Copley launched our forum and we typically bring her back once each year to continue the work we're doing with her and together in our forum. We realized that the work we were doing would be so much more beneficial if our husbands were more aware and involved in the work. So we planned a couples retreat.

The Roost is a 8,000 acre farm and hunting camp located in Clarksdale, MS. It is family property that my forum mate's husband has had in his family for years. We knew we were going to do some hard and deep work with DeLynn while there, so we had to make sure we worked a lot of fun in as well! We all arrived on a Thursday and my forum immediately went into a forum meeting while DeLynn worked with the guys for 4 hours. She brought them up to speed on the work we've been doing with Enneagrams and the benefit it has in both personal and professional realms. We wanted to make sure they guys had a basic understanding of the process before we met as couples the next day.

Day 2 was dedicated to couples work with DeLynn. We all met as a large group and did some group exercises with each other as couples and with other spouses. Fortunately our spouses know each other well and trust each other so this worked well.

Day 3 was dedicated to one-on-one couples work with DeLynn where she could focus on each couple and specific issue they may have. She gave us all very specific guideline and communication exercises we could do at home. This was priceless!! Our mornings and evenings were filled with fun! Each morning one couple would lead the group in some form of workout. We all had to get out of our comfort zones and did everything from Crossfit, to walking the property, to sprints. And of course, our guys did some hunting too! Evenings were fabulous! We had a chef from a well-know Memphis restaurant come in to cook for us one evening, we had a local Clarksdale chef cook one evening and then went to Morgan Freeman's famous blues bar one evening. The combination of learning, relaxation and fun made this a retreat we'll never forget. Our husbands were so glad we put it all together and we all want to do it again soon. We all gained knowledge we could use in both our personal and professional lives, but most importantly we all left each other with deeper friendships. Because we used forum protocol in all meetings, we knew we were safe and supported with confidentiality as the key. I would recommend couples retreats to any member or spouse forum! T



# Forum Retreat Competition Submissions



# Forum Retreat Competition Submissions

<b>Region: South Asia</b>	
<b>Retreat Name:</b>	<b>Happiness</b>
<b>Location / Venue:</b>	Goa, India
<b># Days:</b>	3 days
<b>Moderator Name :</b>	Name withheld at request of submitter
<b>Facilitator Name:</b>	n/a
<b>Chapter:</b>	YPO Delhi

## Statement

### Creativity/Integration

In order to complete a Happiness module we had to find out where we all were in our lives with our relationships - one of the most important factors in being happy. We each did a Spouse/Marriage unprepared life walk. Just concentrating on that one relationship. The magic of working into night with the sound of sea behind us was unparalleled. We had one member and her 4 month old baby - we accommodated as needed - we got through the work in with a deep sense of sharing and understanding that set the stage for the next two sessions - with exercises, videos, INK talks and drawings!

Balance We wanted to do something unique to Goa. My co-moderator took the responsibility of reaching out in her field, Art and arranged the most spectacular dinner at the home of an author and photographer. It was stunning, the home was gorgeous, he curated the conversation for the next four hours and took it to places we would not imagine. We had a French chef who created a fabulous meal and every course was served in a different part of the house - on the verandah, in the courtyard and up on a patio at the top of hill behind the house. Such a special evening. At the dinner it was suggested by our host that we see more of Goa and we move out of our hotel setting to gorgeous bamboo hut resort for the day, much further North - we loved the idea. We were packed and in our cars at 830am - I love the spontaneity of the group and their willingness to try anything. It was well worth the drive - the meeting took place on a deserted beach table with our feet in the sand. We completed a fabulous module and then ascended to a deck that could have been in the Grecian Islands, we ate the most exquisite meal looking over the ocean. We sang we danced we laughed we cried.

Shared Responsibility- I was 7 months pregnant and two of my members picked up on some of my sense of "so much to do" and took over from there - the flights were booked and the hotel arrangements made. On arrival at the hotel there was some confusion about rooms and it didn't fall on me to make everything alright, the decisions were taken, rooms were changed and nothing more needed to be said. We have one member who organized a guided meditation session for us at sunset on the second day. It was the most rejuvenating experience at the perfect time of day. I loved being part of group where everyone felt they have just as much to contribute in making this an enriching three days for everyone.

Protocol/Continuation We love following rules, we find it best way to achieve the most from our forum, even as we follow up on all our many issues in the meetings that follow.

# Forum Retreat Competition Submissions



# Forum Retreat Competition Submissions

<b>Region: Southeast Asia</b>	
<b>Retreat Name:</b>	<b>MetaStila Coffee Plantation/Finding Zen</b>
<b>Location / Venue:</b>	MetaStila Plantation, Central Java, Indonesia
<b># Days:</b>	3 days
<b>Moderator Name :</b>	Sam Peterson
<b>Facilitator Name:</b>	n/a
<b>Chapter:</b>	WPO Phillipines

## Attachment

[https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/kgziaxdTiv8%3D/tri\\_state\\_forum\\_retreat.pptx](https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/kgziaxdTiv8%3D/tri_state_forum_retreat.pptx)

## Statement

Please see the attached description as it covers many of these points.

In Summary: Creativity of Exercises: We actually chose not to have exercises, but instead focus on our environment to free the mind and set the tone. We carried out 6 presentations, including one session that was more like the now known "river" experience found in the 4-step covering a highly vulnerable subject (FC). Balance: We combined Yoga, an exercise session, a dinner overlooking a beautiful volcanic mountain, and a tour through the working coffee plantation. Shared responsibility: As we often do, we divided responsibilities: logistics, non-meeting activity, meals, session moderation (was me as we rotate this responsibility). Forum protocol: we all trained within the last 2 years and being WPOers, have years of experience in respecting protocol and giving and taking feedback on such. Continuation: We did follow up on a few of the presentations, but more so, we regularly reminisce of the weekend... a great sign of a good retreat. Please note

# Forum Retreat Competition Submissions



<b>Region: Western</b>	
<b>Retreat Name:</b>	<b>Elevate</b>
<b>Location / Venue:</b>	Durango, Colorado
<b># Days:</b>	3 days
<b>Moderator Name :</b>	Paul Dickerson
<b>Facilitator Name:</b>	n/a
<b>Chapter:</b>	WPO Fort Worth

## Attachment

[https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/ud7BEYhjq4s%3D/ypo\\_fort\\_worth\\_forum\\_5\\_retreat\\_elevate\\_2015\\_submit\\_ypoi.pdf](https://ypowpoforum.wufoo.com/cabinet/zb9ws141kqpjca/ud7BEYhjq4s%3D/ypo_fort_worth_forum_5_retreat_elevate_2015_submit_ypoi.pdf)

## Statement

PLEASE SEE ATTACHMENT FOR MORE DETAIL, PHOTOS AND AGENDA YPO FOR WORTH FORUM 5 - DURANGO 2015 1st Retreat for a newly created Forum (less than a year). Retreat Survey revealed members wanted a 50% mix of work and fun with a budget of \$2000 per member. 9 members - just added 2 new members (1 meeting prior to the retreat). Assigned 2 Retreat Mentors to the 2 New Members to help make them feel comfortable. 2 members coordinated the work agenda and moderated the retreat. 2 members coordinated the budget and fun agenda. 2 members presented the drama triangle and strategic planning 1 Member's plane and ski home in Durango Colorado. We have not revealed retreat theme or agenda to all members, only the destination city. Members letting go of the need to control is a healthy change.

Preparation for the retreat - come ready to be real, honest, open with a healthy sense of adventure.

- Your expectations for the retreat
- Updates - the most significant issue
- THE ONE THING – be prepared to discuss 2 or 3 “most” meaningful goals you hope to accomplish in the next 6 months to 1 year; ask yourself ... what goal ... when accomplished ... would have the biggest impact on my life? We will give each other feedback using paired coaching. We will all agree to ONE goal for this FORUM YEAR, be accountable and work toward it together.

THEME As we reached cruising altitude, we revealed and began discussing our retreat theme – ELEVATE. We agreed that we as a group would: Go deeper, share feelings, experiences that can only be discussed here. More honest, true and meaningful. We want to elevate the quality of the conversation. We want to challenge each other. Iron sharpens iron. OVER THE NEXT 3 DAYS, WE WILL ELEVATE Elevate individually and as a forum, to consciously be the best we can be A deeper understanding of ourselves through the lifeline exercise Elevate our relationships through an understanding of the drama triangle Elevate our businesses through a pathway to strategic planning in our organizations Elevate ourselves as leaders of our business through tools and understanding to help us develop. GOLF CAP with ELEVATE and a triple diamond black ski symbol. Snowmobiling to the

## Forum Retreat Competition Submissions



highest point in the area. Skiing from the top of the slopes to the base together. 2 Coached Presentations The 1 thing Life-Line Drama Triangle Strategic Planning Honoring Ceremony Elevate has become the theme for our Forum year and we these incorporate discussions into each meeting. At our meeting immediately following the retreat, we started with a photo slideshow from the retreat and played it on a loop throughout the whole meeting. It served as a reminder of our amazing shared experience and our ethos to elevate each other. Iron sharpens iron. At each meeting since, our objective is to get back to the mountain in our hearts and minds and continue to build on the closeness, trust and honesty we enjoyed.

# Forum Retreat Competition Submissions

