



# Partners In Health

ENGAGE

## Kickoff Retreat Toolkit



## PIH Engage Kickoff Retreat Toolkit

### What is a retreat?

A PIH Engage retreat is an opportunity to gather as an entire team and create a concrete vision for the rest of the year. During retreats we brainstorm and commit to measurable goals, imagine a series of events to meet those goals, and individuals commit to owning the planning and work to accomplish those events. Retreats work best when your members can commit to meeting for an extended period of time—anywhere from 2-5 hours—and focus intensively on the task at hand. Eat dinner together, spend some time getting to know each other more, and have fun, but spend a significant chunk of time creating a game plan and goals that will shape the remainder of your campaign.

### Why hold a retreat?

This retreat will lay the foundation for your campaign—it will create the shared purpose and commitment that will drive your campaign forward. Without this vision, it's very difficult to plan far enough ahead, and to craft a truly cohesive campaign where each piece contributes to your broader purpose and goals. Hold this retreat early on in the year to best allow you to carry out the campaign.

### What should be the key outcomes of your retreat?

1. **Agree upon the purpose of your team.** Draw from each of your members' stories—why are we all here? Why did we choose to be involved? What do you want to accomplish as a team this year?
2. **Set concrete measureable goals** that will contribute to achieving your purpose.
3. **Build relationships, team roles, and team responsibilities** necessary to achieve your goals. Who will take ownership and accountability for which big pieces of work? How often will you meet, and when? What norms and expectations will we hold one another accountable for?

### Sample Retreat Agenda

See below for a sample retreat agenda. We believe each of these sections is important, so while you should feel free to be creative, try to hit all these major points during your retreat. When planning the schedule, fill in the times based on when you decide to host your retreat!

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

**Location:** \_\_\_\_\_

| Time        | Activity   | Facilitator<br>(write your or a member's name here!) | Output                  |
|-------------|--|--|-------------------------|
| ____ : ____ | Introductions and Agenda (15 minutes)  |  |                         |
| ____ : ____ | Story of Self (30 minutes)   |  |                         |
| ____ : ____ | <i>(For existing teams)</i> Reflection on last year's campaign: Pluses/Deltas (15 minutes) |  | Pluses/Deltas worksheet |
| ____ : ____ | Introduce this year's campaign (30 minutes)  |  |                         |
| ____ : ____ | What do you want to accomplish this year? (45 minutes)                                     |  | Campaign Arc Drawing    |
| ____ : ____ | Goal-setting (30 minutes)  |  | Goal-Setting worksheets |
| ____ : ____ | Roles, Responsibilities and Team Norms (30 minutes)  |  | Team Norms              |
| ____ : ____ | Wrap Up and Report Back (15 minutes)   |  | Next Steps, Report Back |

**Keep reading for details on each activity and worksheets you can print and complete at your retreat.**

### Introductions and agenda (15 minutes)

- Introduce any new members, give them a chance to share who they are and what they do
- Catch up (how was everyone's summer?)
- Call/text any latecomers
- If eating, have everyone get food
- Review the retreat agenda and outputs

### Story of Self (30 minutes)

We all have compelling stories to share and in doing so we learn the values that have called us to this work. You should first introduce the idea of Story of Self and then provide a few guiding questions to help members shape their story:

#### **Step 1: What is a Story of Self?**

You tell a story of self to enable others to “get you” – to understand the values that call you not only to serve the cause you serve but to accept the responsibility to lead. The key is to focus on choice points: moments when your values determined your response to challenge or uncertainty. When did you first care about being heard, about others, about abuses of power, about poverty? Why? When did you feel you had to do something? Why did you feel you could? What were the circumstances? A story of self can be powerful due less to “high” or “tragic” drama than to the courage you show in allowing others to see something of yourself: not your deepest secrets, but the key shaping moments in your life.

#### **Step 2: Guiding questions**

1. Can you think of a specific moment that inspired you to take action on global health? A moment that was a turning point for your career choice, for your academic study focus, or even just caused you to come to this meeting?
2. What was challenging about this moment? How did you feel?
3. Why did you make the choice you did (to study global health, to work at this organization, to volunteer for PIH Engage, to come to this meeting)?



**For existing teams: Reflect on last year's campaign: Pluses/Deltas (15 minutes)**

Hear feedback from your team, and be honest! No matter the outcome of last year's campaign, now is the time to reflect and think big about what you want to change.

- Review what you accomplished last year. Did you hold meetings regularly? How often? Were you able to recruit and build a solid team of committed members?
- What big events did you hold? How much money did you raise? What advocacy actions did you take? What went well for each campaign peak and what would you change if you did it again?
- Reflect more broadly on how your team worked together. What went well? What do you want to improve on? What will be the ways that you make these improvements?

| <b>PLUSES (+)</b><br>What went well? What successes did you have?    | <b>DELTA (Δ)</b><br>What could you have done better? What do you want to change? |
|--|--|
|  |  |
| <b>How will we expand on these successes and make these changes?</b> |  |
|  |  |



## Introduce this year's campaign (30 minutes)

Creating a clear, shared understanding of your team's purpose is no easy task, but it's an important one! Each member should be able to articulate what your PIH Engage team is trying to do.

**Start by reviewing the mission statement of the PIH Engage network.**

**Our Mission:** PIH Engage aims to build the right to health movement by growing and amplifying PIH's work to advance the right to health globally. Partners In Health builds health care delivery systems and serves the poor; PIH Engage brings resources and builds power to stabilize the financing of these systems globally. We recruit and train teams of volunteer organizers to raise funds and engage with policymakers, focusing all of our actions on the three pillars of PIH Engage: advocacy, fundraising, and education.

Discuss this with your team! Some guiding questions could be:

1. What does the "right to health movement" mean to you? Why does PIH Engage aim to build a social movement?
2. How does the work of PIH Engage connect to Partners In Health's work? How are they different, and how are they connected?
3. Why do we call ourselves "organizers?" Why do we need teams and structure to be successful?
4. Why do we focus on advocacy, fundraising, and education?

**Then, present the broad ideas of this year's PIH Engage campaign to your team.**

## What do you want to accomplish this year? (45 minutes)

How will you translate this broad mission statement into real, measurable goals? And from there, how can you imagine a series of connected actions which will form your campaign peaks for the year? Present some of your ideas and vision to your team, then discuss as a group what peaks you'll commit to organizing, and how they connect back to your broad mission statement and specific goals.

### What is a campaign peak?

This is PIH Engage's way of pinpointing the specific events that will give your yearlong campaign shape and momentum. A "peak" could be anything from a fundraising event, to writing a letter to the editor, to a personal fundraising campaign, to a meeting with your member of Congress. The main idea is that each of these peaks has a date or timeline, a set of measurable goals associated with it, and builds power throughout the year to achieve your goals. An example: *In the spring, we will raise an additional \$3,000 by hosting a Strides in Solidarity walkathon, organize 2 panel discussions on specific global health topics, and bring 5 people each to 2 meetings with members of Congress.*

### Choosing campaign peaks

This discussion with your team will define your work for the rest of the year. Certainly, circumstances may change throughout the year and you may have to readjust or set new goals, but this plan is what will guide you and determine whether our entire movement will be successful. Be realistic, but also ambitious! And above all, think critically about *how each of your campaign peaks connects to and advances the PIH Engage mission.*

This is your chance to be creative and fun! Shape your campaign and choose your peaks to suit *your* team. However, there are a few moments that can be really powerful if the entire PIH Engage network comes together.

1. We need every team to participate in a personal fundraising push this November. You'll get more details on the personal fundraising push on an upcoming webinar, so be on the lookout for that email!
2. We need every team to use the specific advocacy tactics and timelines that we propose. Our advocacy power comes from thousands of people speaking with one voice, at the same time, in the same ways. There are certain moments and tactics that will most effectively advance us towards our advocacy goals, so we need everyone with us!
3. We believe that largescale, culminating fundraising events are a great way to wrap up the year. In the past, many teams have hosted successful "Strides in Solidarity" walkathons or 5ks – consider hosting one this spring!



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∞ Now that your team has all the information it needs, commit to a series of campaign peaks that feel realistic and ambitious, connect to PIH Engage's mission, and move us towards our goals. Writing them on this timeline will help you visualize the year!

### Goal-setting (30 minutes)

Based on your mission statement, purpose, and campaign peaks, what are the specific, measurable goals that will make your campaign successful? Break down these goals in detail.

Note: Each peak will have different goals. Think about what would make your event a success in relation to your mission statement – Is it 50 people in attendance at a panel? \$3,000 dollars raised? One meeting with your Senator? Then, break down the specific steps you need to take to reach that goal (a timeline, number of people receiving an in-person invitation, etc.)

*Example:* Strides In Solidarity Walkathon

Goal: raise \$3,000

- If your Recruitment Team has 10 members, and they are each responsible for recruiting 10 participants: 100 participants x \$15 entry fee = \$1,500
- If each member gets 3 of their 10 participants to create a fundraising page: 30 participants set a goal of \$100, they each actually raise \$50, 30 participants x \$50 = \$1,500

TOTAL: \$3,000

Remember the SMART goals criteria!

**S**pecific

**M**easurable

**A**mbitious

**R**ealistic

**T**ime-bound

Collective Goal-Setting Worksheet

|  | Detailed Goal Break-down |
|--|--------------------------|
| <p><b>Peak #1</b></p> <p>Date:</p> <p>Location:</p> <p>Primary Goal:</p> |                          |
|  | Detailed Goal Break-down |
| <p><b>Peak #2</b></p> <p>Date:</p> <p>Location:</p> <p>Primary Goal:</p> |                          |



|  | Detailed Goal Break-down |
|--|--------------------------|
| <p><b>Peak #3</b></p> <p>Date:</p> <p>Location:</p> <p>Primary Goal:</p> |                          |
| <p><b>Peak #4</b></p> <p>Date:</p> <p>Location:</p> <p>Primary Goal:</p> |                          |



|  | Detailed Goal Break-down |
|--|--------------------------|
| <p><b>Peak #5</b></p> <p>Date:</p> <p>Location:</p> <p>Primary Goal:</p> |                          |
| <p><b>Peak #6</b></p> <p>Date:</p> <p>Location:</p> <p>Primary Goal:</p> |                          |

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**Roles, Responsibilities and Team Norms (30 minutes)**

Now that you have a campaign timeline and detailed set of goals, what will be the team structure necessary to carry out this campaign?

- *If you're a new team without a leadership structure (yet!):* Take a few minutes to describe the leadership structure (Team Coordinator, Advocacy Lead, Fundraising Lead, and Community-Building Lead) and the roles of each of these leadership positions. Explain the snowflake leadership model and why it is integral to our success. Then, ask who would be interested in taking on each of these roles and schedule a one on one to follow up with each candidate.
- *If you're an existing team with established roles:* Split into your Advocacy, Fundraising, and Community-Building teams. Each Lead should ask their team members who would like to take the lead on each of their team's events or campaign actions. How will you break down the work necessary to be successful? Assign specific point people to each peak.

**Advocacy Lead:**

- Peak #1 Leader(s):
- Peak #2 Leader(s):
- Peak #3 Leader(s):
- Peak #4 Leader(s):
- Peak #5 Leader(s):

**Fundraising Lead:**

- Peak #1 Leader(s):
- Peak #2 Leader(s):
- Peak #3 Leader(s):
- Peak #4 Leader(s):
- Peak #5 Leader(s):

**Community Building Lead:**

- Peak #1 Leader(s):
- Peak #2 Leader(s):
- Peak #3 Leader(s):



**Peak #4 Leader(s):**

**Peak #5 Leader(s):**



**Finally, discuss the norms and expectations you'll all commit to as a team.**

How often and for how long will you need to meet in order to reach the goals you've set? How should you structure the meeting time? To avoid constant scheduling, try to find a consistent meeting time that doesn't change.

**Meeting Date/Time:**

What other team expectations will you set? (ex: attend all team meetings, respond to emails within 24 hours, take turns facilitating each meeting, treat each other with respect and kindness, etc.)

**Write them here:**

If your team's up for it, ask everyone to sign their name to commit to these goals, roles, and norms that you've set together!

**Team Members' Signatures:**

### Wrap Up (15 minutes)

- Take some time to reflect on all that you've accomplished. Ask your team to share pluses and deltas for the retreat.
- Schedule the date and time of your next meeting.
- Review the work that needs to be accomplished by each team member before the next meeting. Make sure you send these and any notes from the retreat out in a follow up email!
- Review the commitments you all made for communicating between now and your next meeting.

### Retreat Reflection

| <b>PLUSES (+)</b><br>What went well at this retreat? | <b>DELTAS (Δ)</b><br>What could you have done better? What do you want to change? |
|--|---|
|  |   |