

[RETREAT TOOLS]

THE RETREAT THIRDS RULE

Forums break up over bad retreats. Plan a third, a third, a third, and folks do not come away disappointed: covered great stuff, actually got time to connect, not exhausted.

THE THREE THIRDS

1. **One third forum exercises.** Deep-dive experiences on a theme: lifelines, the 3-3-3, life wheel, letter to my future self, KPI and goal setting. First retreat, or any retreat after adding a member, must include a retrospective exercise so everybody has a shared history.
2. **One third activities.** Do something. Tour another member's business, get on the water, something active. This is where the retreat earns its stories.
3. **One third unstructured time.** Pure downtime, no agenda. This is not filler; it is where the deep conversations you seeded actually happen.

"I front-load the exercises that facilitate the deep, meaningful conversations. That way my unstructured time on days two and three is seeded with all of these rich conversations. You come back feeling like you covered great stuff, but you're not exhausted, because you got time to catch up and connect."

COLTON MULLIGAN, FORUM CHAIR TRAINING, MAY 2026

MAKING THE THIRDS WORK

DO

- ✓ Front-load the heavy exercises on day one; save downtime for the back of the trip.
- ✓ Assign homework if your forum will do it. Highest and best use: fill out the worksheet on your own time, share it together.
- ✓ Mix the three exercise families: retrospective (shared history), snapshot (where my life is now), forward (goals and future self).
- ✓ Bring a professional facilitator every other year. That is EO best practice, not just Mulligan.
- ✓ New forums: mini retreat by meeting four. Lifelines on day one, KPI and goal setting on day two.

DON'T

- ✗ Don't wing it. "We're 60 days out and I don't even know the agenda" is how retreats sour, and it should come up in clearing.
- ✗ Don't schedule every hour. A packed agenda kills the third that does the bonding.
- ✗ Don't burn retreat time sitting around quietly filling out worksheets.
- ✗ Don't drop the retrospective because "we already know each other." Vulnerability is what bonds forums; it is what makes them sticky in a good way.
- ✗ Don't run heavy exercises in the final hours and send everyone home drained.

Sources: Created by Colton Mulligan for Forum Playbook. Framework and language from his forum chair trainings (May 2026). Companion to the "How to Plan a Great Retreat" video and the Retreat Exercises library on ForumPlaybook.com.