**Mandate**

**Retreats & Conferences – Best Platforms for the Future?** Ron & Tim H. discussed the differences between how NAIM views and implements retreats and conferences and this document was sent to OC. Tim C will be the liaison for OC and get this group started using the context/questions from the “NAIM Event Task Force” document. This group will be in play by the February 2020 OC. (From the Operations Council Notes)

**Staff Conference (SC)** – SC’s primary purposes are spiritual enrichment, synergy and professional development (organizationally and individually). SC is required for all employees except volunteers or CMMs. SC purposes: an opportunity to unplug from the grind of ministry; face to face business and administrative communication; strengthens the legitimacy to the Religious Order and an opportunity for the Annual General Meeting.

**Retreats –** The purposes of retreats are spiritual enrichment, camaraderie, fun and refreshment. Retreats are a chance to unplug from ministry and share and pray. Speakers give spiritual or topical challenges (these can be gender focused).

**Goal #1:** To determine if the existing staff conference and retreats are the best platform to fulfill their purpose both now and in the future.

**Goal #2:** To make recommendations based on the results of goal #1 on how NAIM should proceed going forward.

**The Team**

Based on the original recommendations made by Ron H and Tim H a diverse group of staff were contacted who had the capacity and willingness to serve on a task force to address the two goals that Ron & Tim established.   The team included Cheryl Reynolds, Sean Folkerts, Nikki Clarke, Sharon Hartwig, Taylor Lee, Charity Johnson, and Tim Christensen.

**Context:  Who we are and who we’re becoming**

Let’s start with the fact that NAIM staff are awesome!  We sacrificially serve Jesus by making disciples among and with First Nations people in Canada and the US.

Many of our veteran staff experienced the birth of the covenant relationship under the leadership of Bill Lottis.  Our newer staff (those who have been here less than 25 years) share a similar commitment to each other.  Regardless, it is clear from our surveys that NAIM staff have a high value on unity.

We have become a diverse organization with a central identity around our Savior and our calling.  We include staff from different cultures, nationalities, and religious experience.  We have boomers, gen-x, millennials and soon will be adding zoomers to our numbers.  Staff expectations can differ from person to person.  While holding tight to our doctrinal statement, our staff at times have diverse opinions on missiology, theology and its practical application in life.

NAIM staff stretch from new recruits to veteran staff in their 70’s.

Staff age and recognizing how close some staff are to retirement can have an impact on what, where, and how we deliver our intended purposes through the event platforms today and over the next few years.  In a report prepared by Scott Markloff, he notes that in 2019, 23 of NAIM staff are between 56-67 years old and 18 are over 68.  Those numbers change in 2024 to 25 staff between 56-67 and 27 staff over the age of 68.  NAIM continues to actively recruit new staff in all categories which continues to add to the need for flexibility in serving the diverse needs and desires of our staff.

In summary, NAIM’s current event policy requires:

48 staff to attend staff conference.  This includes all full and part-time staff but excludes staff who can choose to attend either staff conference, a retreat, or a workshop.

31 staff required to attend men’s retreat.

17 staff required to attend women’s retreat.

5 staff can attend either men’s retreat, staff conference or a workshop. (3 CVs and 2 CMMs)

13 staff can attend either women’s retreat, staff conference or a workshop.

It should be noted that there are always exceptions to every policy and every year staff are given excused absences based on policy or necessary accommodations.

In a clarifying email, Ron provided this information, “In planning and making recommendations for changes to how we do retreats and conferences, I think they should approach it with the expectation that we are probably going to be very similar with who we are today.  If we do experience huge changes to our makeup, we can have another task force five years from now if we need to.”  Ron also requested that we focus on today with an awareness of our needs over the next couple of years.

**Goal #1:**  To determine if the existing staff conference and retreats are the best platform to fulfill their purpose both now and in the future.

The question raised by Goal #1 has been and will probably remain a perennial question asked at NAIM.  After listening to staff responses, extensive research and conversations we believe that the existing NAIM structures of holding one Staff Conference, a centralized Women’s Retreat and a centralized Men’s Retreat are still the best platform to achieve NAIM’s stated purposes both now and into the future.

Our recommendation is to embrace this platform as part of NAIM’s culture from recruiting through retirement.  NAIM should keep these platforms in place and focus on how we can improve them year to year to achieve our purposes.  There will always be other platforms and methods to achieve our purposes, but this platform is and can be made more effective in the years to come as life, ministry and NAIM’s needs change.  We have tried various platform models over the past five years and **our recommendation is** *to create stability for our staff and staff culture by leaving the overall structure of having one centralized Staff Conference, Women’s Retreat and Men’s Retreat alone for the next five years*.

**Goal #2:**To make recommendations based on the results of goal #1 on how NAIM should proceed going forward.

After prayerful and thoughtful consideration, we would like to make observations and recommendations to OC about how we can improve and enhance the ability of our events to achieve their goals going forward.

Based on the phone survey results there are three general areas that deserve ongoing attention as our specific observations and recommendations are considered.  We believe that the specific observations and recommendations will address these general observations.

1. **Spiritual enrichment and prayer:**  Partially achieved but room for improvement.
2. **Professional development:**  Partially achieved but room for improvement.
3. **Effective use of time and resources:** Although the overall response to this question is that NAIM has mostly achieved this goal, 23% of 22 staff asked this specific question felt that NAIM has good intentions but has made little to no progress in this area.

**Observation:**The existing structure of holding staff conference, women’s and men’s retreat is a generally beneficial structure.

**Suggested solution(s):**There should be no change to the basic existing structure.

**Observation:**There appears to be a preference to create family inclusive conferences instead of our current alternating Family & Adult only conferences.

**Suggested solution(s):** We recommend that NAIM move to a Family Conference every year for a trial period of 3 years.  We believe this will support greater unity (a strong value for NAIM staff) by bringing us together.   Additionally, NAIM would benefit by:

* Establishing long-term relationship(s) with churches to provide child & youth programming and overall support during the conference.
* Identifying a conference location that is family friendly and available in August.
* Incorporating the youth in the meetings as a regular part of the music & light-hearted entertainment.

**Observation:**The “round-robin” method of sharing responsibilities to plan events isn’t consistently effective.

**Suggested solution(s):**We recommend the following solutions:

* Identify one staff person (Event Planner) to be responsible to make sure all event planning happens in an efficient and timely manner.   This is part of their job description.  (*Since this document was presented it is clarified that the Communications Director is the Event Planner or is responsible to appoint one*)
* Recruit people who are energized by planning and have the skill sets required to plan events successfully and efficiently.  These people would be part of a “talent pool” that the planner could readily access every year.

**Observation:**Facilities vary greatly with multiple problems including:

* Handicapped accessibility
* Quality of food, lodgings & amenities
* Flexibility to work with NAIM’s schedule

**Suggested solution(s):**The event planner should identify the facilities that best fit our event needs and cultivate a long-term relationship instead of moving event locations to different regions every year. Book them more than a year in advance so we are guaranteed our reservation.

**Observation:**Scheduling events has become challenging as we try to prioritize the needs of various staff.

**Suggested solution(s):**

* Schedule Staff conferences to accommodate the earliest school starting dates in Canada and the US for the next 3 years.
* Schedule events at the same time every year so staff can anticipate the dates.

**Observation:** For some staff, events are too short for the time and expense it takes to get to an event.

**Suggested solution(s):**  Take a Poll at Staff Conference (whether in person or Zoom) on whether 4 nights for these events is desirable.

**Observation:**Utilizing Zoom to hold staff meetings gives NAIM the ability to handle “Housekeeping” requirements online to maximize the usage of our face to face “in person” time.

**Suggested solution(s):**

* Consider rewriting NAIM’s religious order bylaws to allow NAIM to hold the AGM for the religious order online.
* Consider holding shorter, more frequent online staff meetings instead of waiting to hold one large meeting at staff conference.

**Observation:**There is a strong value among some staff to hold special staff-driven events in addition to the required NAIM conferences and retreats.  These can vary widely in purpose, cost, and environments.

**Suggested solution(s):**NAIM can create a fillable template that staff can use to meet established criteria to hold special staff-driven events in addition to the required NAIM conferences and retreats.  This would become part of NAIM’s policy and could include:

* Date, location and duration
* Minimum number of staff
* Clearly stated purpose
* How purpose will be achieved
* Budget (rule things in and out)
* Approved by Regional Director, Operations Director and Finance Director

**Observation:**  During our discussion of the challenges around planning and implementing Women’s Retreat it became clear that Men’s Retreat on occasion includes access to leadership that is missing at Women’s Retreat.

**Suggested solution(s):**Equal access to NAIM leadership should be made available at Women’s Retreat.