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Accounting Department Retreats

By Mary Anne Gaffney and Bill N. Schwartz

Like many CPA firms and private industrial concerns, accounting departments across the country are holding faculty retreats. Retreats represent one way that accounting departments can set aside a significant portion of time away from the routine of daily pressures to deal with issues of importance to the department.

Through a combined mail and telephone survey, the authors learned of 50 schools who have held retreats recently. The following discussion is based on interviews with the individuals who were in charge of those retreats.

Why Have Departmental Retreats?

Retreats are an ideal way to increase faculty cohesiveness. Most departments hold their retreats at off-campus locations that provide a pleasant atmosphere. The schedules usually include some time for faculty socializing.

Lunches and coffee-breaks are often part of the scheduled activities. Some departments have organized sports as part of the activities. Others conclude their retreats with a dinner and the spouses of the faculty members are invited.

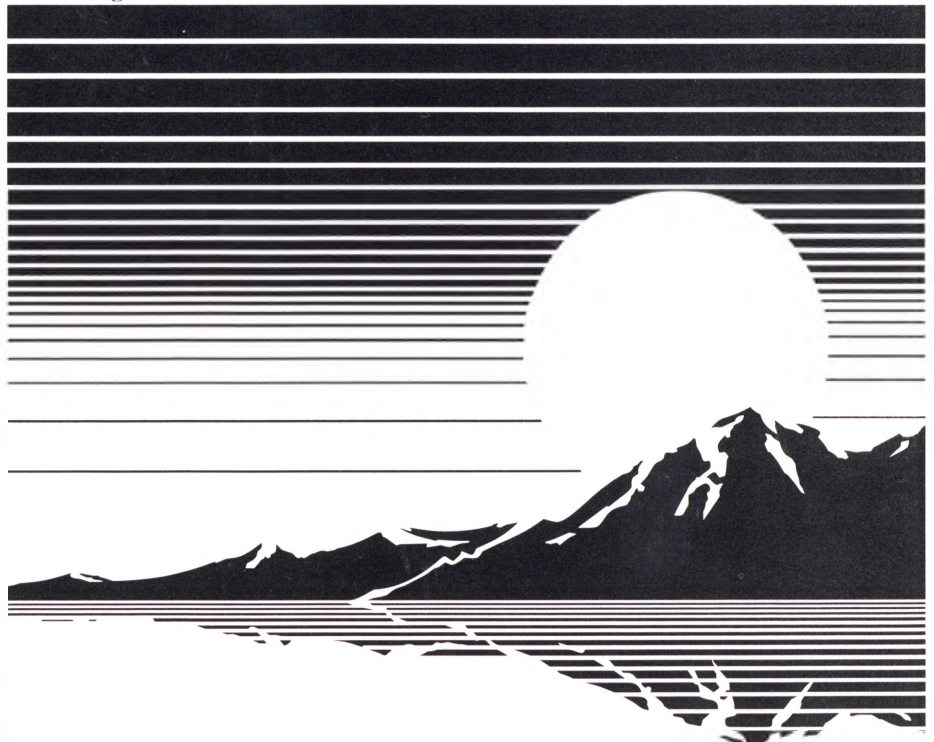
The appointment of a new department head is a major event which leads to many retreats. A retreat gives the new administrator, who is the academic equivalent of a managing partner, a chance to get to know the faculty and to listen to their concerns and differences of opinion in a non-threatening environment.

One of the most important reasons for holding retreats versus the routine department meeting is to provide the opportunity to discuss topics in much greater depth. To facilitate this, most departments have agendas and often distribute a significant amount of pre-retreat reading material. Discussion

may be restricted to a few highly sensitive topics or to specific long-range issues such as the 150 hour curriculum design. Some departments even hold one-issue retreats.

For other departments, the retreat is simply a lengthy traditional faculty meeting. A large number of topics may be covered, and faculty votes can be recorded. For these departments the chief reason to hold a retreat is the ability to get the entire accounting faculty together at one time away from the interruptive routine of daily campus pressures and activities.

Respondents generally considered the most successful retreats as those where a limited number of topics were discussed in depth and often centered on long range issues, within the department and business education in general.



Quality Planning is a Key to Success

It is crucial that a department be certain a retreat is needed. A department may need to improve collegiality, conduct long range planning in a setting more conducive to lengthy discussions, or consider some problems that cannot be addressed within the constraints of a routine faculty meeting.

Second, financial support must be available. Most departments pay for their retreats through general fund raising although a few are able to use budgeted departmental funds. Some obtain specific gifts from accounting firms for the event since the latter are aware of the benefits of such retreats.

Third, suitable scheduling must be arranged. A retreat which lasts overnight may be preferred since it leaves more time available for the faculty to meditate on problems as well as time to socialize. During the latter, views are often exchanged in a more relaxed setting that can bring about a consensus when the formal meeting is reconvened. For this reason, if a one-day retreat is scheduled, it is a good idea to provide time for some informal or unstructured activities.

Various times of the year could be considered, depending on the major focus of the retreat. For example, a retreat aimed at collegiality would be particularly appropriate in September when new persons join the

faculty. While one might feel September retreats may be too early in the academic year for significant issues to be raised, one should remember that it can be difficult to currently implement solutions reached at end-of-year retreats. For these reasons, October and January were perceived to be good times to hold retreats that focused on either the issue of collegiality or on longer run strategic topics.

Finding an appropriate location is important when planning a retreat. It is best if an off-campus site is available for the retreat. Either university conference centers away from academic facilities or large hotels are good places for retreats. Retreats held in major resort areas may be too distracting for participants.

Good planning generally is facilitated by the preparation and distribution of an agenda before the retreat. The agenda should not contain too many items. Discussions should be scheduled so that sufficient time can be given to hear all opinions and to reach a consensus.

The selection of good discussion leaders is very important for a successful retreat. Different individuals should be used for each topic. Every effort should be made to involve all participants and to avoid having a few dominant persons taking over the discussions. This can be alleviated if the discussion leader is careful to solicit opinions from as

many participants as possible.

Finally, feedback from the participants should be sought. Faculty members should be asked to prepare evaluations about each major element of the retreat and to make suggestions to improve future retreats.

Conclusions

Like partners in CPA firms and executives in private industry, accounting faculty often need to step back from their day-to-day activities. They need to get away from their telephones and computers, and take a good look at what they are doing. Retreats offer a forum for airing faculty differences, make an excellent setting to discuss long-range issues, and generally enhance collegiality. To make them successful, a proper environment must be selected, the right date chosen, a sound agenda prepared and capable discussion leaders selected. Most respondents felt that improved departmental cohesiveness resulted from their faculty retreats.

Editor's Note: This article has been greatly condensed. Persons may wish to contact the authors directly for more information about developing a retreat for your firm's personnel or accounting faculty.

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