

Chart Your Course Retreat Program

Thursday October 22nd

Time	Topic	Leader	Director Focus	Team Leader Focus
4pm	World Café Roundtable – Setting the Stage for Connection	Sheree Henley & Michaela Kennedy	Listen for shared priorities, concerns and opportunities that can inform governance and future direction.	Identify practical issues, ideas and team experiences that affect how plans are implemented day to day.
6.30pm	Welcome Dinner	Sheree Henley & Michaela Kennedy	Build relationships and strengthen the peer networks that support good governance and decision-making.	Build relationships and strengthen the peer networks that support practical problem-solving and implementation.

Friday October 23rd

Time	Topic	Leader	Director Focus	Team Leader Focus
9am	Welcome and why we are here	Sheree Henley & Michaela Kennedy	Clarify the director's role in setting direction, providing oversight and enabling a good life.	Clarify the team leader's role in turning direction and plans into consistent everyday practice.
9:10am	Developing Vision & Values - Governance – impact on implementation	Sheree Henley	Set a clear vision and values framework that guides governance decisions, priorities and expectations.	Translate the vision and values into clear team behaviours, routines and everyday decisions.
10:00am	HR support – common risks and how to minimise them.	Melissa George-Macquire	Understand key employer risks and ensure appropriate policies, delegations and oversight are in place.	Apply HR policies consistently, address issues early and maintain clear staff records and communication.
11:00am	Morning Tea			
11:15am	Governance – legal structures and tax implications	John Leslie	Understand the legal and tax responsibilities attached to the chosen structure and make informed governance decisions.	Understand how the organisation's structure and obligations affect the procedures and records the team must follow.
12:00pm	Setting up the Open Space Agenda	Michaela Kennedy	Identify governance, sustainability and strategic questions that would benefit from peer discussion.	Identify implementation, staffing and operational questions that would benefit from peer discussion.
12:30	Lunch			

Time	Topic	Leader	Director Focus	Team Leader Focus
1:00pm	Open Space Round 1 – Peer Conversations	Michaela Kennedy	Explore director-level challenges, options and lessons with peers and identify ideas to take back to the board.	Explore implementation challenges and practical solutions with peers and identify ideas to take back to the team.
2:00pm	Open Space Round 2 – Peer Conversations	Michaela Kennedy	Explore director-level challenges, options and lessons with peers and identify ideas to take back to the board.	Explore implementation challenges and practical solutions with peers and identify ideas to take back to the team.
3:00pm	Feedback and reflection	Michaela Kennedy	Reflect on what needs to change at governance level and identify the next director actions.	Reflect on what needs to change in day-to-day practice and identify the next implementation actions.
4:00pm	End of day 1 – time to catchup, explore Perth, make plans for dinner, or rest and reflect		Use the break to reflect on key governance insights and priorities from the day.	Use the break to reflect on practical ideas that could improve team implementation.

Saturday October 24th

Time	Topic	Leader	Director Focus	Team Leader Focus
9am	Welcome	Sheree Henley	Reconnect the day's topics to the director's responsibility for direction, oversight and sustainability.	Reconnect the day's topics to the team leader's responsibility for implementation, coordination and follow-through.
9:05am	Financial obligations - bookkeeping	Penny Michie	Understand the financial oversight, accountability and reporting directors need to maintain.	Understand the records, processes and information the team must provide to support accurate financial management.
10:00am	Planning, goal setting, tracking process – governance oversight NDIS progress for Services for One	Sheree Henley	Set priorities, approve goals and use meaningful information to monitor progress without managing day-to-day work.	Turn goals into actions, allocate responsibilities, track progress and keep implementation moving.
11:00am	Morning Tea			
11:15am	Current changes - NDIS reform update –	Michaela Kennedy	Understand what reforms and practice standards mean	Translate policy and practice standards into workable daily

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	impact on Services for One - Compliance obligations New practice standards & data collection		for governance, compliance oversight and organisational assurance.	processes, documentation and data collection.
12:15pm	Review of Open Space Agenda	Michaela Kennedy	Prioritise remaining governance and strategic questions for peer discussion.	Prioritise remaining implementation and team leadership questions for peer discussion.
12:30pm	Lunch			
1:00pm	Open Space Round 1 – Peer Conversations	Michaela Kennedy	Explore director-level challenges, options and lessons with peers and identify ideas to take back to the board.	Explore implementation challenges and practical solutions with peers and identify ideas to take back to the team.
2:00pm	Open Space Round 2 – Peer Conversations	Micheala Kennedy	Explore director-level challenges, options and lessons with peers and identify ideas to take back to the board.	Explore implementation challenges and practical solutions with peers and identify ideas to take back to the team.
3:00pm	Feedback and reflection	Michaela Kennedy	Reflect on what needs to change at governance level and identify the next director actions.	Reflect on what needs to change in day-to-day practice and identify the next implementation actions.
4:00pm	Close – Farewells and a warm send-off to carry the retreat energy back into your everyday work.	Sheree Henley and Michaela Kennedy	Commit to a small number of governance actions and how progress will be followed up after the retreat.	Commit to practical implementation actions and how progress will be communicated and tracked with the team.