

## CO-ACTIVE LEADERSHIP ASSISTANT MANUAL

Welcome to leadership assisting. You have just become part of an elite group of leadership graduates who are bringing their experience of Level 4 leadership forward to support and hold a group of participants embarking on this journey to watch them open to the power within themselves and to see their leadership bloom. Leadership assistants have told us that this experience was a powerful way to bring their learning and leadership to a much deeper level. We are thrilled to have you, and we look forward to sharing this journey with you.

Please read through this entire manual and gather any questions you have prior to traveling to the retreat center. If you have questions that aren't answered here, please contact the Leadership Program Specialist at CTI to get your questions answered before you arrive on site.

### CTI CONTACT INFORMATION

Marsha Greenfield

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Other emergency numbers are located in the filebox onsite.

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## Preparing Yourself before the Course

You received a confirmation email that contains your tribe name, leader's names, contact information for your co-assistant and retreat schedule information. This email tells you when you are required to arrive on location. You may want to communicate with your co-assistant prior to the course to coordinate transportation arrangements and to begin to design your alliance with each other. Please keep this information in a place where you can lay your hands on it as needed in order to refresh your memory about retreat schedule and times.

Complete all the required Items on the Assistant Web Page  
(weblink: <http://www.thecoaches.com/leadership/assisting.html> )

- ☐ Read and sign the assisting agreement
- ☐ Complete the assisting questionnaire
- ☐ Complete the dietary needs form
- ☐ Complete the medical form and sign the release of liability
- ☐ Read this entire assisting manual
- ☐ View the presentation of the video camera overview
- ☐ Download directions and packing information for your retreat site
- ☐ Call CTI with any outstanding questions

We recommend these tasks as well to help you feel grounded and ready

- ☐ Download and review the participant course journal
- ☐ Review your own groups Leadership dvd (mailed to you after R4), to give you a better idea of what you will be video taping and why
- ☐ Contact your co-assistant to get to know each other, begin to design your alliance and coordinate any travel plans

## Agreements and Expectations

This is a duplicate of the assisting agreement you signed for your information. Please review this agreement from time to time to refresh memory of your commitment.

**Assumptions:** As an assistant you need to be able to handle the physical rigors of the ropes course, be outside in bad weather and carry up to 20 pounds. Also know that assisting is emotionally demanding. You must have outstanding self-management and must stay disengaged from the tribe participants who you are assisting. eg. no emails, fraternizing or partying with them. You need to be clear that this is a service to the participants of The Co-Active Leadership Program.

**Benefits:** There is HUGE learning in it for you! You need to constantly practice being at level 4 leadership as an assistant, and that is one of the major benefits. You will always be looking for what the level 3 of the room needs from a logistics point of view; always looking for what the leaders need at level 3, so that they can give their full attention to the participants. You will be asked to constantly practice the art of listening from level 3 and level 4. You will be having regular meetings with the course leaders and from time to time your own personal learning goals will be addressed. (This is not a guarantee, however it is a strong likelihood.) Every person who has ever assisted at this program has grown to a new level of maturity as a leader, and has gained a more

clear insight into what works in leading others. We ask that you take the responsibility for your own learning and your impact.

**Timing:** Retreats 1,2,3,4 all begin at 10:00 am and end at 3:30pm on the last day. In US – Before R1 please come to the retreat center by 3:00pm on the Monday to prepare logistics and orient yourself to the site and equipment. In Spain: Please come to Almiral de la Font by 3:00pm on the Saturday before R1 for an on-site orientation. On the evening before R1 leaders & assistants get together for dinner to design their alignment. This "eat & meet" is paid for by CTI. For subsequent retreats assistants are expected to arrive at the retreat center the late afternoon/early evening prior to the start day. Please note you will be on your own for dinner & breakfast before the retreat starts. Once the participants arrive and the retreat has begun, at least one assistant must be on the grounds at all times. Assistants are usually finished with inventory, storage and debrief and ready to leave the retreat center about two hours after the completion of each retreat.

**Training:** You will find a downloadable manual for retreat specific logistic instructions and video camera training on the Leadership Assistant website. It is essential that you dedicate time before you arrive at R1 to read the manual and watch the camera training video.

**Costs:** CTI covers your room and board at the retreat center. Transportation costs to and from the retreat center will be your responsibility. We suggest that the assistants carpool if at all possible. We also ask that you be willing and able to use your own car (or rental car) during the retreat for any necessary errands. Should a taxi be required for emergency requests, CTI will reimburse the cost.

**Agreements:** I understand that there are written instructions for each retreat. I will be responsible for reading them carefully BEFORE the beginning of the retreat, and will call the Leadership office or talk to one of the leaders if there is anything I do not understand, or cannot /will not do. I will thoroughly and accurately complete the supply inventory for each retreat, to the best of my ability. I agree to arrive at the stated times and places on time, and be available at the retreat center for at least two hours after each retreat ends for debriefing with leaders, and inventory check/clean up. I will keep all names and experiences of others confidential. I will also honor the confidential nature of the design of the retreats, including the timelines. I understand that the design of The Co-Active Leadership Program is intellectual property of Laura Whitworth, Karen Kimsey-House and Henry Kimsey-House, and will not share it with anyone outside of these retreats.

**I agree to be fully present for all four retreats.** If an emergency should arise and I cannot attend, I agree to help identify an appropriate replacement for myself, and discuss it with one of the leaders and office staff as soon as possible.

I have read, understand, and agree to all of the above.

## FAQ's – Assistant Wisdom Sharing

These FAQ's were created by past assistants to answer common questions regarding the particles and the space of assisting.

### What is the role of an Assistant?

Your role is to be Leaders in the back of the room. Expressing silent leadership. You are powerful without words. You create connection from a non-verbal heart-space. Go deep into your L3

leader space. Assistants contribute to the L3 and are able to shift the space depending on their invisibility. Assistants sit in the back of the room in corners and the leaders in the front - the arrangement serves as a container for the tribe.

To partner with the leaders to increase their ease and comfort level. Design alliances with the leaders - trust - and ask for what you want. There will be rich learning if you bring the gift of inquiry to play in L3 & L4 discussions. Be transparent with the leaders and let it go. Be yourself. Have fun. Design alliances with your co-assistant. You have each others backs. Trust the flow and be an ally for each other, sourcing ease and being on purpose.

Assistants set an example at R1 of the impeccability and importance of how to hold Time, Beauty/Order and Morning Ritual.

### **Are there lots of details and particles?**

YES. R1 has abundant particles. It is the most difficult retreat in terms of the number of details to attend to while forming as a team with your co-assistant. Also the tribe does not begin holding time, beauty or morning ritual until R2. Some Assistants choose to divide their primary responsibilities according to technical skill sets with video camera, music, audio/visual, kitchen punctuality, etc. There is lot's of running around at R1 - look after yourself.

Spend time to read and know the timeline and assistant manual, so you can be 'on top of' and anticipate the details. This is the best way to be in service of the leaders - so they don't need to think about the 'objects' of the events. Assistants LEAD the details so the leaders can keep focus on the participants. You will be using the video camera to film clips of the entire program and some events in entirety.

### **What is the stake of the Assistants?**

The assistants stake is to hold each other, the space and the particles while working together in service of the leaders and the tribe.

### **Why are boundaries necessary? How do you hold boundaries with participants?**

You've had your own tribe experience and this is not your tribe. You are here to witness and hold the space for the participant learning. Start early to train the participants to go to the leaders with inquiries and learning. If participants are unclear of boundaries - you can point to what matters "not the assistants leadership experience but what the participants experience will become". Keep your conversations superficial. Be aware of your impact on participants and save deep conversation until after R4. Your co-assistant is the best outlet for your energetic build up, concerns or frustrations - lean into each other.

### **What advice do you have for new assistants?**

Have fun. Partner with the leaders. Be yourself. Trust the process. Be conscious at all times. Source for self. Fall into the experience. Be impeccable with your self and the leaders.

### **What is service leadership?**

To be in service of the Level 3 of the space and to be as invisible as you can.

### **What was difficult about Assisting?**

Managing LI concerns - for example sitting silently in the assistant chair for a chair-challenged kinesthetic person. I used a mantra - 'this is not about me. This is easy and manageable'. Be kind to yourselves when you have spare time.

Camera work / filming - it took time to be playful with the responsibility and have fun. I called forth my co-assistant to partner with me.

As a Charm type I wanted to be a part of the community so much - I really had to learn to self manage and establish boundaries.

Problems can arise especially if Assistants don't design clear alliances with their co-assistant; choose to interact with participants partying or giving input or advice; don't show up energetically or anticipate details.

### What did you get out of Assisting?

More than I ever thought I would. I got an insider view of the leadership program and an increased growth and understanding of L4. In partnering with the leaders I got respect from the leaders.

### What might a Co-Assistant Alliance contain?

Trust your co-assistant to 'call you out'

Be transparent.

Trust the process.

Create consciously before each retreat for co-sourcing

Find out what support looks like for the other.

Hold me 'big'. Do not take care of the other- ask for help if needed.

Check and clean-up with each other every day.

## On-Site Set-up

In this section you will find a list of supplies that are stored at the retreat center. Please familiarize yourself with the supplies and when they are needed. Not all supplies are used for every retreat.

Everything you need specific to each retreat is either shipped to you from CTI, or stored onsite. You will always have a box of materials for leaders and assistants shipped.

In US Locations only, the camera(s) are shipped to the retreat center in a Pelican Case, cleaned with fully charged batteries. There are combination locks on the case that will open with the **combination 629**. The exception to this is in instances where there was a retreat on site immediately before your retreat, in which case the camera will be left in onsite storage. In Spain, our local administrator will deliver the camera(s) to the retreat center along with the other needed materials.

## On-site Supply Storage

**General Supplies Box** – This box will be used for each of the retreats. It contains basic office type supplies such as scotch tape, ipod, chimes, extra video tapes etc... There is a complete list on the inventory sheet. It is important that you be specific and detailed when taking inventory on the last day – this is what initiates our supply replacements for the tribe that comes after you.

**First Aid Supplies** – The first aid kit should not be readily accessible to participants. Please keep it in a location where you can get your hands on it, day or night, in case a need arises. Let the participants know that materials are available but don't provide them open access to it.

**Retreat Specific Event Supplies** – (example R1 I AM voting paddles, R2 index cards and sticky pads and pens, R3 fans and mirrors)

**Backpacks** – these can be used for transporting the video camera equipment and supplies and your personal items for outdoor and offsite events.

**2 Tripods** – The majority of the time during the retreat you will keep the video cameras mounted on these tripods. Be sure the tripod camera mount is on each tripod. Please store the tripod camera mount on the tripod, not on the camera, when you pack them back up after the retreats.

**Retreat Specific Games** – Spider web set-up, marbles and tubes, ball and board and an air pump for maintaining the ball etc...

**Bag/Box of Ropes** – Used for R.I path to success and for low rope activities throughout the program.

**I AM Chart** – The chart is in a portable canvas bag. You will want to assemble it in the event room. The metal pieces are color-coded and fit together by matching the colors. Put the metal frame together first by laying it flat on the floor then put the I AM chart over it like a sock. You will need the assembled chart ready early in day 2 of R.I (see timeline).

**Assistant Chairs and Stools** – You will place these at the back of the room for the assistants to sit in during the sessions.

**Blankets, pillows, cushions** – These items make the room more homey and comfortable. Be sure these are set out somewhere in the room during retreats. At the end of the retreat package them up to keep them organized and clean when they are in storage.

SPAIN – there are no blankets, pillows or cushions

East Coast – the facility will provide pick up and delivery of these items

West Coast – they are stored in on-site storage

**Hand Drum** – The drum is used specifically for Retreat 3 on day of silence – but can be used anytime you need something loud to call participants in.

**Rain Gear** – The rain gear is to be used as back-up on rainy ropes days for participants who forgot to bring their own. Please be sure the gear is dry before packing it back up and storing it.

**Box of Books** – The books are specific to participants reading homework and should be put out on display somewhere in the course room for browsing – they are not for borrowing.

**Flip Chart Paper and Easel** – There should be a flip chart with paper set up in the event room at all times. You will want to be sure there is a sufficient supply of paper and markers with the chart.

**L4 Chart** – This is in a round tube and needs to be hung in a visible place at the front of the course room throughout each retreat.

**Sound System** – The sound system needs to be set up and a sound check performed prior to the participants' arrival. Each retreat center's sound system is slightly different. Please follow the instructions for your location.

- **Sequoia** has Portable Music System that needs to be brought up to the room and set up. The mixer is the brain for the ipod, tv, speakers, microphone. Unless there is a tribe directly

after you the sound system should be broken down and returned to storage at the end of each retreat.

- **Spain** has a permanent sound system that is a stereo.
- **Bend of Ivy** uses a permanent sound system with a soundboard.

**Kleenex** – Be sure there is always Kleenex available in the course room (minimum 3).

**Participant Chairs** – The chairs will be in the course room either set up or ready for you to set up. You will need to be sure that there are a correct number of chairs for your participants and that the chairs are in good shape. Set the chairs up in a “u” shape.

**Televisions** –TV's should be set up for Saturday night for ropes playback and for lifeboat playback in R1. In addition, they are used in R2 for ropes playback and R3 for arcs and timing DVD viewing. Each retreat center's TV viewing system is slightly different. Please follow the Video Playback section of this manual for specific instructions for your location. You will also need to locate the necessary AV cables for set up.

- **Sequoia** – 2 flat screen Televisions - they need to be brought up but not until the weekend.
- **Spain** – you'll need to find them from other rooms and bring them into the event room.
- **Bend of Ivy** – TV's are in the lodge and they are on rolling carts.

## *Boxes Shipped From CTI*

### **Medical Emergency Reminder**

You will find a Red Emergency Procedures folder right on top of the box. The emergency protocol is one of the most important things to establish when you first meet with your leaders. This will allow you to act quickly in case of emergency, knowing who has up-to-date CPR, 1st aide experience, who will be the designated driver, the location and directions to the nearest hospital, who will go with someone who goes to the hospital (typically one of the assistants). If there is not a car available then use a taxi or an ambulance must be called if it is determined that there is risk in moving the participant.

This folder comes back to the office each time and we will return it to you for each retreat so we know it is readily available and up-to-date in case of emergency. Information in this binder includes emergency contact numbers, contact numbers for where leaders are staying and vendor numbers. Please get familiar with the material in this folder.

See the procedures in the folder for full reporting details in the case of an incident. All accidents or incidents must be reported right away to the leadership office staff – if it happens on weekend – Karen's number and Sabrina's number are in the binder call them.

### **What you will find in the box every time, unless noted, is:**

#### **Leaders File**

This includes timelines, retreat specific event descriptions, low ropes write-ups, course completion form etc...

#### **Assistants File**



This file includes participant medical forms, timelines, retreat specific event descriptions, camera shipping instructions, inventory forms etc...

**Participant Journal (R1 only)** – You will find the leather journal cover and the bound printed inserts shipped separately. You will need to put the insert into each cover and have a journal prepared for each participant. Have them ready to hand out during R1- Day 1 per the timeline. (keep them out of sight until then) If there are any extra journal covers or inserts they should be shipped back to CTI at the end of Retreat 1. (Leaders and Assistants do not receive the participant journal) Leaders and assistants have a permanent 8 ½ x 11 spiral bound copy on site to be used while onsite and left onsite for other tribes use. The Leader, and assistant journal does not include the tribe name pages – with the tribe name and description - those are shipped in the supplies box for your use.

**Name Badges (R1 only)** – Name badges should be prepared and laid out on the entryway table in first name alphabetical order before participants are scheduled to arrive on day 1. At the end of Retreat 1 please send back all the name badge holders in the box to CTI for recycling. (please remove the names from the holders and trash or recycle them)

**Course Roster** – Before the last day of each retreat be sure ALL participants have read and initialed the roster with any changes noted. The updated roster is returned in the box to CTI at the end of the retreat. CTI updates it's database for internal purposes. This information is launched in iCohere for the participants with corrections after retreat one with the I AM types.

**Video Permission Form (R1 only)** – Have participants sign the video permission form on day 1, after the leaders explain the reason for the form. (CTI will not use the video for marketing purposes). If anyone refuses to sign or we begin filming before they sign, they can be edited out of the final gift video.

**Video Tape DVD Request** – These are also located on the participant iCohere site. The original dv tapes are not available to the participants, they must return to CTI. This form gives information about how to buy a master copy of the full high ropes course video on dvd.

**I AM Type Forms (R1 only)**– (two duplicate copies of the same form) Fill out both forms accurately and completely taking the information directly off the flip charts. Enter the support words in order from greatest number of votes to least. Anytime the tribe divides into two groups the leaders will need these forms, for example ropes course day. At the end of the retreat, return them in the box to CTI. CTI will enter the information into their database.

CTI will print I AM Type report from the database and return them in the box for use at R2. The students will receive the I AM Type information in the roster that is sent to them from iCohere.

**\*Medical and Liability Forms (\*Very Important)** – Please have each individual sign the liability page on the back of their medical form and write their contact information on DAY 1 of Retreat 1. This information is private so please maintain privacy and confidentiality. Don't put them out for students to pick up please deal with them one on one. Please do not read the medical information on the participant forms. The leaders have already reviewed the participant forms prior to the course and they will inform you of any necessary details. These forms will get shipped back to CTI after each retreat and will be included in the materials box shipped from CTI for each retreat.

**Ropes Course liability form (RI only/for US Locations only)** – These need to be signed by the participants and turned over to the Ropes Course staff on the morning of the Ropes Course event before they go on the Ropes Course.

**Post Card Appreciations (RI only)**– The leaders will have post cards for distribution on the last day of Retreat I. (3 per participant max – these are not souvenirs)  
Preference is for all post cards to be returned with assistant's materials to CTI for addressing and stamping from the database. This enables CTI to also acknowledge those that are being appreciated (ie. Those that referred business to the Leadership program.) However, participants are not required to turn them in, it is ok if they prefer to take them home to address.

**Fed Ex Envelope** – (US Locations only) You will receive 2 Fed Ex return labels in the box. One label is for the camera box and one for the materials box, unless instructed differently based on the timing of other retreats.

**Camera Return Instruction Form** (US Locations only) – The combination (629) for the Pelican Case locks are on this form. This form is bright blue and tells whether or not the pelican case will be returned by fed ex or stored onsite (cleaned with fully charged batteries) for the next program. (Typically cameras are sent back to CTI, but depending on the course schedules sometimes the camera stays at the retreat center for the next tribe.)

**Bandanas** – Use these as required for activities. At the end of the retreat please, always send ALL bandanas back to CTI whether or not they have been used.

The grid below will give you a general idea of which supplies are used when.

RETREAT SUPPLY GRID					
Item	Used in Retreat				Notes
	R1	R2	R3	R4	
General Supplies (see inventory sheet)	x	x	x	x	
First Aid (see inventory sheet)	x	x	x	x	
R1 Box (see inventory sheet)	x				
R2 Box (see inventory sheet)		x			
R3 Box (see inventory sheet)			x		
Books (see inventory sheet)	x	x	x	x	
Backpacks	x	x	x	x	For carrying camera equipment, asst. supplies
Hand Drum with mallet	x	x	x	x	For outdoor calling back of tribe
I AM Chart in carrying bag	x				
L4 Model	x	x	x	x	
Low Ropes rope ( 2x26', 1x47', 1x93')	x				Path to Success, Rope Push, Jump Rope
Post-it easel pads	x	x	x	x	
Rain ponchos					Extra rain gear- as needed
Spider Web game			x		
Marble & Tubes game			x		
Square board with hole game			x		Inflate ball firm
Ropes to attach to board			x		
Small blue barrel & ball				x	Inflate ball firm – window of opportunity
Air Pump					As needed to keep ball firmly inflated
Blankets, pillows, cushions	x	x	x	x	
TV cables and cords, remotes	x	x	x		Lifeboat, ropes playback, Arcs & Timing
Tripods for cameras	x	x	x	x	
Improv Props				x	Montage, Juggle

**Storage Location by Facility:**

WEST COAST US: Storage is in the Los Alas building basement on the storage shelves. Enter through outside downstairs door.

EAST COAST US: Storage is in the Pavillion building in the locked cupboards under the window seats. (The key is in the box shipped from CTI)

SPAIN: Storage is outside of the Casita in the locked walk-in locker.

## Assistant Logistics Outline

### *Retreat I*

Retreat I is the most logistically demanding retreat for the assistants. First, there are more materials to prepare, more events to set up and more preparation than other retreats. In addition to these duties, you and your co-assistant will manage beauty and order, timing, and morning ritual until the participants are trained and take over those duties.

Along with your assisting duties, we are asking you to be the eyes of the group and to capture on video the events and memories that are unique to this tribe. It is important to get familiar with the video camera and playback before the retreat begins.

Although you will be busy, you won't be alone. You have many resources to support you during the retreats, this manual, the leader timeline, your co-assistant, your leaders, and if you get stuck you can always call Marsha at CTI during the week or in case of emergency on her cell after hours.

You will know which equipment should be brought into the room at what times based on this outline, the leader timeline and your meeting with the leaders – read your timeline and be prepared in advance.

The retreat center isn't responsible for bringing the boxes to or from their offices. Please stop by the office on your way into the property and pick up anything that has come by way of FedEx. When you leave the retreat property, take the box and Pelican Case back to the retreat center office ready for them to call for fed ex pick up (the return FedEx labels are in the box).

### **AFTERNOON/EVENING BEFORE DAY 1:**

Please cover emergency medical procedures (driver, hospital directions, current CPR training, skills etc.) among leaders and assistants pre retreat.

Familiarize yourself with the materials shipped by Fed Ex from CTI and also the supplies stored at the retreat center. These materials are described in detail on the previous pages.

Your shipment boxes include the Retreat I journals for all participants. These will need to be assembled before day 1. Additionally the leader and assistant materials, video tapes, cameras, medical file, nametags, timelines and other items specific to this retreat will be in the Fed Ex box. Please get acquainted with the locations where all equipment and supplies are kept, and their contents.

Familiarize yourselves with the General Supply box, First Aid box, Book box, Retreat specific equipment, the Stereo / iPod equipment in the event room, and the Audio-Visual equipment.

Bring the tripods, cameras, video tapes, "general supply" and "Retreat I" equipment into the event room, along with 3-4 boxes of tissue (supplied by the retreat center). Check the Retreat I box and First Aid box against the inventory sheet to make sure you have everything you need.

Bring the assistants' chairs to the back of the event room.

Familiarize yourselves with the video cameras and instructions. Watch the (Elks) sample retreat video (general supply box) if possible to get an idea of what you should be focusing on when shooting. Try experimenting with the tripod, zoom, in/out and other camera features with the practice tape provided. Please treat the video cameras very carefully.

Check to make sure you have everything you need for the Lifeboat video playback. We suggest trying to playback the practice tape you used in the camera to be sure you are ready. No surprises!

Sweet dreams!

### **BEFORE 9 AM DAY 1:**

- Arrange the participant nametags in alpha order. Then lay them out on a table near where the participants enter along with a roster (for mark-up by participants). Choose the best location for participants entering for the first time, if you have questions check with the leaders.
- Set up chairs in the event room in a “u”.
- Attach the Level 4 Leadership model to a wall or window near the leaders.
- Lay books out in a visible place...
- Identify and designate the “men's bedroom”(s) by taping a note to the door.
- You may need to find a 'sample talking stick' for the event room – if the leaders request.

### **DURING THE RETREAT**

Be crisp with time. To get participants into the event room (or where they need to be next), give them a 3-minute warning chime. Train participants that this chime means they are to be MOVING, not waiting to be convinced or cajoled into moving so they are in their seats at the appointed time.

Pay attention to the leader timelines and do your best to anticipate leaders' needs. They do need you!

On Day 1, make sure all participants have privately signed the liability page on their medical form and initialed and corrected the roster (the roster can be left out on a table during the retreat) and return both in the CTI FedEx at the end of the retreat. The roster will be updated with the new information and will be available on iCohere for all participants, leaders and assistants a week or so after the retreat ends.

### **I AM Typing**

1. Set up the I AM chart from the portable bag. It is compact and easy to assemble. The easiest method is to lay the assembled frame on the floor and slip the words cloth over the top before standing it up and setting in place.
2. The 'voting' paddles can be found in the Retreat 1 box.
3. Bring the easel, 2 easel pads and masking tape to the event room for I AM typing.
4. Fill in the I AM typing information from the easel on the forms provided. 2 forms will need to be filled out in full as each leader will need this information on ropes course day (sub-groups). Please return the completed sheets in the assistant box so we can put the information on iCohere for everyone after the retreat.

### FINAL NIGHT-PARTY PREPARATION:

The beverages (wine, beer, sparkling juice and waters) will be supplied by the kitchen for dinner toasting and after dinner party. Please check with staff to find out what they would like you to do in preparation.

As a general guideline: Chill 12 of beer to start and also some non-alcoholic beer. Put 6 bottles of white wine, 3 bottles of sparkling juice and 3 sparkling waters to chill.

For dinner: Open 2 bottles white wine and 2 bottles of red wine for each table. Also open a bottle of sparkling water and juice. They can open more themselves after dinner.

Encourage participants to recycle the bottles and return their wine glasses to the place designated by the kitchen, at the end of the evening.

### **NOTE: If participants ask about getting COPIES OF video taken at the high ropes courses:**

We need all tapes back after the retreat so they can be edited for the final video (all participants receive this after R4). Upon request, Mark Nida will create a master DVD of Ropes R1 &/or Ropes R2 for a fee of \$150.00 per retreat and send it to the tribe representative to coordinate copying and distribution to the tribe. More complete instructions are available for participants on iCohere.

### BEFORE LEAVING ON DAY 6:

1. Take the last tape out of each camera and label it. Turn cameras to the "off" position. Make certain each camera foot is on the TRIPOD, not attached to the camera.
2. Put everything you took out of storage back neatly for the next tribe. Tripods are returned to storage; but cameras are FedEx'd to the office (unless instructed differently on the blue paper) - USA only.
3. Complete the inventory sheets so we can accurately restock supplies for the next retreat. Please be thorough, check each box and indicate any low quantities. **Fax the inventory pages to CTI Attn: Marsha on the final day 415-472-1204 from the retreat office.**
4. Check all rooms and deck after participants have gone for "lost and found" items and put them in the lost & found bag/box for this group until the next retreat. We do not ship items left after the retreat. The assistants can retrieve lost items for participants at the next retreat upon request.
5. **RETURN TO CTI**  
Put all the materials listed below in the box to the CTI office. Attach the FedEx label and leave the shipment in the retreat office prior to leaving:
  - a. Return the video cameras in hard case (see blue form)
  - b. inventory sheets
  - c. corrected roster
  - d. I AM Type sheets
  - e. leader & assistant files
  - f. postcards
  - g. video permission form

- h. course completion form
- i. name tags
- j. medical file
- k. emergency booklet
- l. all mini dv tapes (both used/labeled and unused)
- m. all bandanas clean and/or used

SPECIAL INSTRUCTIONS FOR SPAIN: gather and leave all of the above in the walk in storage container for Ana.

THANK YOU for the incredible service you provide by assisting the Leadership program! We are open to hearing anything that would be useful for you or future assistants who follow in your footsteps...procedures, supplies or communications.

And last but not least...HOPE YOU HAVE/HAD A WONDERFUL RETREAT!

## Retreats 2, 3, and 4

### **BEFORE the retreat starts:**

- Familiarize yourself with the “general supply” box and retreat specific equipment, games and technical equipment. Check supplies against inventory to make sure you have everything you need.
- Familiarize yourself with the CTI box delivered by FedEx containing specific leader and assistant materials needed for this retreat - timelines, roster, video instructions, inventory form, emergency procedures, etc...
- Set chairs up in event room as Leaders direct. Set up the assistant's chairs.
- Lay books from the book box out in a visible place.
- Display the roster so that contact information can be corrected &/or confirmed with initials.
- Take the tripods, tapes and camera(s) into the event room.
- Please look over the first-aid inventory sheet so you can inform participants if they need anything.

### **DURING the retreat:**

- Be crisp with time, until the participants take over the time duties. Demonstrate and train the participants that the 3-minute warning chime means they are to be MOVING toward the event room (not waiting to be cajoled into moving). Train them to be IN THEIR SEATS at the appointed time... not just beginning to move toward them.
- R4 – make sure Leaders sign the completion certificates and distribute in the matching white envelope on the last day
- Pay attention to the timelines and do your best to anticipate the needs of the leaders.
- At each retreat we ask for the corrected tribe roster to be displayed and initialed by each participant listed. Please return with other materials and mini dvs to CTI

### **Final night party preparation:**

- The beverages (red & white wine, beer, sparkling apple cider, sparkling water) are provided by the kitchen for dinner and the evening events.
- Open 2 whites and two reds per table (unless preferences are known beforehand). Put out sparkling cider and water too. Let them open more after dinner.
- Encourage them to clean up the bottles and glasses at the end of the evening.

**Watching the videos – the assistants need to be sure that ALL the videos are returned to CTI.**

**Reminder for participants borrowing mini dv tapes:** Upon request, Mark Nida will create a master DVD of Ropes R1 &/or Ropes R2 for a fee of \$150.00 per retreat and send it to the tribe



representative to coordinate copying and distribution to the tribe. More complete instructions are available for participants on iCohere.

R3 Sat open mic night videotape: The tape belongs to the community and they can do with them as they please.

**Before leaving on Last day:**

- Take tape out of cameras. Turn cameras to “off” position. Leave camera foot on tripod.
- Complete the inventory sheets. (You can do this on final evening or last day.) Please be thorough so that the assistants following you can be accurately re-stocked.
- Return all equipment and onsite supplies neatly to storage. Please be conscious of the fact that the next assistants will find the materials the way you left them. Put things away in a clean and orderly manner.

**IN USA:**

Fax the inventory pages to the CTI office before you leave on the last day –  
Attn: Marsha 415-472-1204. Thank you!

Pack the video cameras & camera inventory carefully in the hard shipping cases and check that the locks are firmly closed. Apply the FED EX return label. \*\*please read the specific camera instructions for your retreat (bright blue form), in case the cameras need to remain at the retreat center ready for the next week.

Pack the return box with the below materials, tape closed and apply the FED EX return label.

Deliver the FedEx shipment to the retreat center office ready for pick up

**Return to CTI (R2, R3, R4):**

- inventory sheets
- all mini dv tapes (the ones you taped as well as unused ones)
- corrected roster
- course completion form
- medical file (participants)
- emergency procedure booklet
- leader/assistant materials
- bandanas (clean and used) (R1)
- video camera (s) \*\*\* please read the specific camera instructions for your retreat (bright blue form), in case the cameras need to remain at the retreat center (cleaned and batteries charged) ready for the next week.
- East Coast only – Storage Key

**IN SPAIN:**

- All leadership supplies, games, equipment are stored in the metal walk-in container box in the casita driveway between retreats and need to be returned there at the end of each retreat.
- Also return cameras, retreat materials, tapes to the walk-in container. Ana will handle return FedEx to CTI.
- In Spain – Ana Gomez Silvestre – 34 93 894 9184 / cell 34 68 684 9782

We'd love to hear anything that would be useful to you, or other assistants in the future, in terms of info emailed to you prior to the retreat, what is written here, how things are organized, etc

## Video Taping – Preparing to Video Tape Leadership Retreats

The reason we are videotaping the retreats is to create a music style video for the participants as a memory of their time in the program. It is up to you to capture enough decent quality video clip footage of events so that our video editor can create a fabulous final video.

We ask that you get very familiar with the video equipment, camera and tripod, so that you can operate this equipment quickly and safely. We especially ask that you take good care of the equipment during your time at the retreat. We use high quality video equipment and it is costly to repair. Treat the cameras gently. If there are any problems with video equipment, please let the Marsha at CTI office know.

### What should you video tape?

- What the editor is looking for is **small clips of 15-30 seconds** in length.
- You only need to capture bits and pieces of the events.
- If there happens to be an especially HOT interaction happening, you may capture more of it on film, but please, turn the video on and off in short clips, that way, you are sure to capture the juiciest stuff.
- The only exception are a couple events that need to be **filmed in their entirety** – and on dedicated tapes - will be the Lifeboat exercises & the High Ropes in Retreat 1 & 2.

### Some tips for being a good camera person

- As the cameraperson for your group, use your Level 3 and intuition to find the moments that would make for a good memory.
- When zooming in and out press the T/W button gently to zoom slowly. A fast zoom will only create a dizzy effect and won't likely be used.
- When panning move the camera slowly; again any quick movement only creates a dizzy effect.
- For artistic effects, shoot up from the floor or standing on a chair shoot down into the group. (Best to use when the group is dancing or doing a group hug).
- Try to keep the camera on the tripod as much as possible (including outside) you will get much better, cleaner, and steadier shots, especially with zoom. Push the legs together and use the tripod as a monopod for steadying when you want a quick shot and don't want to set up the whole tripod.
- Lastly have fun! You will be surprised to see what your camera work will produce.
- If you have any questions during the retreats, please consult with the leaders. If they don't have an answer, then just film the event as best you can and keep moving.
- If it's a major technical problem, please contact Marsha at the CTI office.

### Common camera mistakes (notes from our video editor)

- Extend the clips to 15-30 seconds - some are too short to use. Fill the tapes.
- Find the best Camera angle - Raise the camera above the group, shoot down, move around to get the best shot - do not shoot thru bodies or branches.
- Gather more video clips from each event – include everything on the retreat checklist + group shots that show the community in action, leaders, assistants, ropes facilitators, kitchen, weather, scenery etc...

- Excessive movement = lost film shots. Always steady the camera on something, use the tripod, monopod or if hand-held lean on something/someone or be sure your elbows are against your body and your legs apart so you are as steady as possible.
- Use zoom lens conservatively – when zooming move slowly - think "slow honey"
- Too many 'talking head shots'/ group debriefs get edited out for final music video
- When you want to capture the whole group – use the wide angle or move camera further away.
- Label tapes with tribe name, camera color, retreat #, tape #
- Lighting challenges- turn on all lights possible for evening.
- Film entire rope experience for each participant from start of ladder climb until back to the ground. Some faces - mostly full body action.
- R3 & R4 only have 1 camera - take turns videotaping LOTS of great moments, scenery and staff.
- Ask leaders and vendors where the best camera angle / camera set up is.
- Day 1 each retreat - get grounded and up and running asap.
- Look for unique moments - watch your own tribe music video again - for tips on what are effective shots.
- Questions? Call Mark Nida (video editor) - 415-299-7888

## Video Camera Guide

### General Guidelines:

- Retrieve tripods, camera, videotapes and backpacks (to carry equipment on Ropes Course days) from the on-site storage area and bring to event room.
- Cameras need to be on SP for all videotaping (tapes record 1 hour).
- The video tells a story, so action shots are best.
- Look through the eyes of a participant. What would they want to see/remember? If any group creativity expression shows up (art, ritual, music, etc.) – tape it!
- Clips should be about 30 seconds long.
- Shots should be a mix. Mostly CLOSE (with one or two people) with some LONG (of groups of people).
- For Ropes Course day, you want to shoot tight on the person with occasional wide shots.
- If an event room is dark, please turn on as many lights as possible. If an event room has bright windows or dark walls – move around for best shots.
- If it is raining when you go out, you must use the raincoats (in the camera bags) on the cameras.
- There are microphone covers for wind noise reduction when you are outside. (Mic covers look like a fuzzy ball with a hole in the middle).
- It takes as many hours to charge a battery as it does to use it up. We recommend charging the batteries at night, you will want a full set of charged batteries to start each day. (Large batteries last about 2 1/2 hours each; small batteries last 1 hour /see manual). Please take the camera to your sleeping room to charge for security purposes.
- Leave lens cover on when camera is not in use to protect the lens.
- Each morning before filming, check the lens for dirt. Special lens cleaning kit is located in camera bags. On rainy days, please wipe any moisture off lens with cleaning cloth. Use the tissue and cleaning fluid for dust.
- The camera instruction manual is well written and easy to use. Use it as needed and to troubleshoot any problems.

- If one Assistant needs to 'fill in' and participate in an event, one Assistant should continue taping – no unmanned cameras.

### Labeling Tapes:

Please be conscientious when you label the videotapes. The labels are critical for us to keep the video tapes organized and to monitor the camera functioning.

1. Put a sticky label on the video tape
2. Put a label sleeve in each plastic videotape case
3. TRIBE NAME / RETREAT # / TAPE # & NAME OF EVENTS ON THAT TAPE / CAMERA COLOR CODE

### At the end of the retreat:

- Remove & label final tapes
- Turn cameras to 'off' position
- **Return the camera foot to the tripod, DO NOT leave the foot on the camera**
- If you had any problems with any of the camera, tripod or A/V equipment, please annotate and leave in the camera bags. Thank you so much awesome assistants!

## Video Taping – Retreat Specific Instructions

### *Retreat I - Video*

Get grounded in your body and ready to tape Day I!

### Capture these events in their entirety:

1. Lifeboat One and Two on Tuesday night (Tribe divides into 2 leader groups)
2. Ropes Course One and Two on Ropes Course day
3. Lifeboat on Type on Saturday

### Please capture CLIPS from each of these activities:

- ☐ Arriving. (Day one)
- ☐ Tour of the retreat center. (Day one)
- ☐ The opening ritual. (Day one)
- ☐ Low Ropes (several from each activity)
- ☐ I AM Typing (get a front shot of the paddles turning)
- ☐ Path to Success (Have one of you on a clue with the video camera. You can get clips in the time in between giving your clue)
- ☐ I AM Coaching (If possible, a clip of each person)
- ☐ Toasting (last night of retreat during the evening meal).
- ☐ Anything else that happens that is interesting
- ☐ It is also nice to capture a few outside shots of the retreat center, such as the retreat building, trees, any spiritual or ritual areas, flowers, ponds, etc. Anything unique about the retreat center.

## Retreat 2 - Video

In this retreat we are looking for things in pairs. Since retreat 2 is about 'Creating from Other', it makes sense to capture participants being in relationship with each other. During this retreat the assistants will have more time to video.

Please film all events on SP recording speed.  
See video camera manual for instructions, if needed.

### Please capture CLIPS from each of these activities:

- ☐ Finding personal symbols in nature (Follow participants as they go out in nature). Please use tripod as much as possible for these shots.
- ☐ Introductions of partners with nature symbols.
- ☐ 'Take and Break', 'Blend and Lead', Trust V training.
- ☐ Improv training with outside vendor.
- ☐ Teams in front of room. (All thru out this retreat)
- ☐ High ropes partner elements (Xylophone, High V, Multi-Vine etc...)
- ☐ Working on homework with partner

### These are suggestions for additional CLIPS to include:

- ☐ Course leaders together and doing work with participants. (Only need a few of these shots)
- ☐ A shot of each ropes staff member present on the ropes courses.
- ☐ The food buffet. (Sometime during the retreat).
- ☐ The kitchen staff if possible.
- ☐ Morning Shin Tai Do (Anytime during the retreat)
- ☐ Nature shots (Retreat center, animals, landscape or anything that seems special)
- ☐ Hot tub, swimming pool, lake etc...
- ☐ Animals
- ☐ Landscapes
- ☐ The weather, if it had any effect on the retreat

### Tip for filming high ropes

On the day of the high ropes we ask you to film the participants going up the ladders, up the tree to the platform as a wide-angle shot. When the participants get up into the tree/platform, zoom in on their faces to capture a bit of them getting connected with their partner. Then as they step out onto the cables, return to a wide-angle shot.

## Retreat 3 - Video

Retreat 3 is about 'Creating from Nothing', and so the videotaping will benefit from the assistants using their Level 3 to capture events. This retreat is a very spacious retreat for the assistants and will have more than enough time to film.

Special Note: The leadership office will typically only send one video camera to this retreat. Assistants can share the video taping between them. Please continue to get plentiful footage! Please film all events on SP recording speed.

### Please capture CLIPS from each of these activities:

- ☐ Day of Silence. Follow the participants to capture how they spend/learn about being in silence. (Please use the tripod and zoom-in on the participant. Do not intrude.)
- ☐ Mirroring
- ☐ Marble in tube. Capture both the participants and a few clips of the marble rolling down the tubes.
- ☐ The Web
- ☐ Low Ropes (outside)
- ☐ 'I AM' types sitting in front of room.
- ☐ Level 3 monitors (fans and arc monitors exercise)
- ☐ Floating Hands meditation (Usually taught in the mornings)
- ☐ Roots and Wings
- ☐ Toasting at Saturday night dinner.
- ☐ Open Mike night. Optional if participants want to be filmed. The video tape is theirs to take and copy. (Film in its entirety and if the event room/stage is dark please turn on as many lights as possible.)

### These are suggestions for additional CLIPS to include:

- ☐ Food line
- ☐ Kitchen staff
- ☐ Hot tub, swimming pool, lake etc...
- ☐ Landscapes
- ☐ The weather, if it had any effect on the retreat.

## Retreat 4 - Video

This is the final retreat and thus the last chance to capture any missing pieces for this leadership tribe. This retreat is another spacious retreat for the assistants and therefore will have enough time to videotape.

**Special Note:** It is very easy for the assistants to get caught up in the activities during this retreat. Please pay attention that all of the events are being video taped. The editor cannot create something from nothing. Keep the video energy up – there's still lots to capture on film! Remember to capture 15-30 second clips & film on SP recording speed.

### Special Video Project:

During this retreat we ask the assistants to video each participant before the end the retreat. Please don't wait to the last day to do this assignment! This clip is a headshot of each participant with their 'I AM' type. (Look at 'The Elks' sample video to see what we are asking for.)

1. Adjust the tripod to chest level and take each participant, (outside is the best) turn on the camera and ask him or her about their 'I AM' or tell them a joke, anything to get them to smile and open up for the camera.
2. Please write the participants first & last name, and I AM type on a piece of paper and film the information, so that the video editor has this information.
  - a. TIP: It's best to have the participants hold their names at chest level so the editor can see their faces and names in the same shot. Then film a few seconds of that, and then have the participants drop the nameplates from their hands and then have them act/talk/dance on type for a minute.
3. We ask that you capture the leaders, kitchen staff, ropes personnel, and the assistants, too. It's easier than you think!

### Please capture CLIPS from each of these activities:

- ☐ Morning Shin Tao Do (anytime during the retreat)
- ☐ Group shot of participants sharing lunch or dinner.
- ☐ A couple of shots of the leaders. (Anytime during the retreat).
- ☐ Color Books
- ☐ Improv training
- ☐ Window of Opportunity on last day.
- ☐ Closing ritual that the group creates.
- ☐ A final group shot with leaders & assistants. Place camera on tripod, start recording and assistants join the group. Let camera run for a minute or so.
- ☐ Groups departing for Scavenger Hunt.

### These are suggestions for additional CLIPS to include:

(If you've captured some of these items in earlier retreats then you may skip taping these).

- ☐ Hot tub, swimming pool, lake etc...
- ☐ Retreat center
- ☐ Animals & Landscape
- ☐ The weather if it had any effect on the retreat



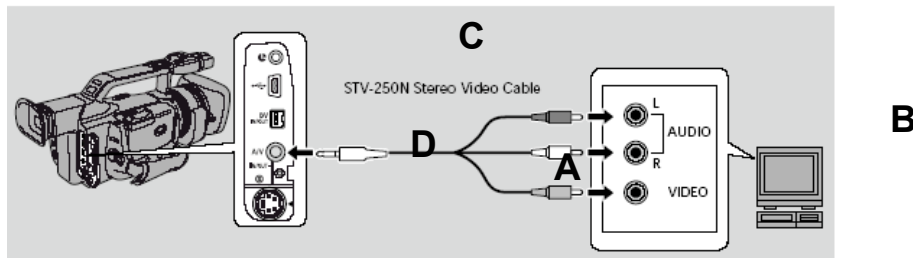
## Video Playback – Setting up the TV

### *Retreat 1 – Life Boat & Ropes Play back*

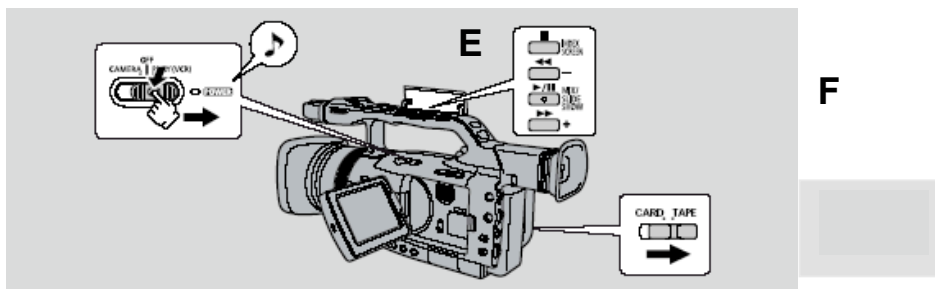
You will use Set Up A below for most retreat centers. However, there is an adaptation (Set Up B) for some locations where you need to connect two cords to stretch the length of the room.

#### SET UP A:

1. Locate long black video connecting cord in the video box in the CTI storage area that has 3 small colored plugs on one end (red, yellow & white) and 1 single plug on the other end ( See illustration **A**).
2. Insert the 3 colored plugs into the TV matching the color plug (male) on the cord to the corresponding color socket (female) on the front of the TV (**B**) yellow cord plug to yellow TV socket, white-to-white, red to red.
3. Locate the small flap on the back of the video camera and open it (**C**).
4. Insert the video connecting cord end with the 1 single plug into the A/V socket in the camera (**D**).



5. Turn the camera power switch to Play (VCR) mode (**E**). You should see a blue screen on the video camera viewing screen. And if the TV is on, you also should see a blue screen on the TV.
6. Press Play (**F**) on the control buttons found under the cover on the carrying handle.
7. You are now ready to view the tapes.



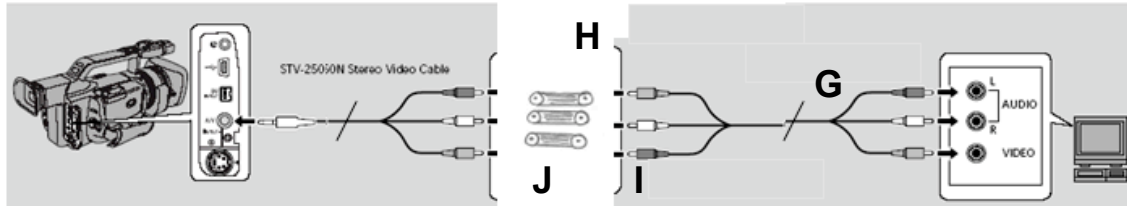
*NOTE: The TV can be operated by remote. The remote control can be located in video box. If necessary, extra replacement batteries are in the general box.*

#### **Problem Solving**

1. The TV isn't set on the correct channel.
2. The plugs are not pushed completely in.
3. Video camera isn't turned onto video playback (power switch).

## SET UP B:

In some locations you will have to connect two cords to stretch the length of the room for Lifeboat playback. Here's the set up variation:



1. Locate long black video connecting cord in the video box in the CTI storage area that has 3 small colored plugs on both ends (red, yellow & white). **(G)**
2. Insert the end with 3 colored plugs into the TV matching the color plug (male) on the cord to the corresponding color socket (female) on the front of the TV eg.) yellow cord plug to yellow TV socket, white-to-white, red to red **(B)**
3. Locate 3 small video adaptors found in the video box. These adaptors are about 1' in length **(H)**.
4. Insert the 3 colored plugs on the cord coming from the TV into the small adaptors **(I)**.
5. Locate the camera cord (found in camera case) that has 1 plug on one end and 3 colored plugs on the other end) **(A)**.
6. Insert the 1 single plug end of this camera connector cable into the **camera** (open the small flap on the back of the video camera next to battery) **(C)(D)**.
7. Insert the 3 colored plugs on the other end of the camera connector cable into the 3 small adaptors. This will join the cord from the TV to the adaptors and the adaptors to the camera **(J)**.
8. Then, complete the set up by doing steps 5, 6, and 7 from SET UP A

## IN SPAIN:

### TV in 'Sex Room'

- Switch TV on
- Press + button on TV
- On remote control (grey), press → once, then P+ ▲ till you get to AV channel.
- See Video Playback Instructions

### TV in "Kids Room"

- Switch TV on ( left black button)
- Press the TV/AV button to AV A
- Then press ▲ on black remote till you reach 'CINCH'
- See Video Playback Instructions

## Appendix A

### Generic Meal Schedule

Meal Schedule by Retreat and Day

Meal		Times by Day					
		Tues	Wed	Thur	Fri	Sat	Sun
R1	breakfast		7:00	7:00	6:00	7:00	7:00
	lunch	noon - 1	12:00	12:00	box lunch	12:00	12:00
	snack	4-4:20	4:15	4:00	off site	3:15	
	dinner	6:30-7:30	6:30	6:30	6:30 ?	6:30	
R2	breakfast*		7:00	6:00	7:00	7:00	7:00
	lunch	12:00	12:15	box lunch	12:00	12:00	12:30
	snack	3:00	3:00	off site	3:30	3:30	
	dinner	6:30	6:30	6:30?	6:30	6:30	
R3	breakfast*			7:00	7:00	7:00	7:00
	lunch		12:00	12:00	12:00	12:00	12:00
	snack		2:45	1:40 & 4:30	3:30	2:30	
	dinner		6:30	6:30	6:30	6:30	
R4	breakfast*			7:00	7:00	7:00	7:00
	lunch		12:00	12:15	box lunch	12:00	11:00
	snack		3:50	4:15		2:15	
	dinner		6:30	6:30	6:30	6:30	

\* please leave breakfast set up for leaders after participants (7- 8:30) at R2/3/4

