

Planning a Retreat

A retreat is an ideal way to get away from daily distractions and deal with often-neglected issues like team building, long-range planning, etc. Regardless of its specific purpose, a retreat can have many benefits:

- Help members to get to know each other
- Foster group spirit
- Set an expectation for participation
- Increase member commitment
- Enhance planning and problem solving

A retreat need not entail a great deal of expense nor take place at a plush resort. A retreat can take place at a nearby park, in a neighborhood church, at a member's house, or in the Student Lounge. Whatever arrangements you make, you'll want to consider the steps listed below in planning your retreat.

RETREAT PLANNING PROCESS

1. SURVEY MEMBERS

Start by talking with your members. Do they see the need for a retreat? What are some of the general goals they would like to accomplish? What specific topics would they like to discuss? After determining a general time period for the retreat, ask what scheduling conflicts they may have.

2. DELEGATE RESPONSIBILITIES

Divide the work to be done among key people or form committees that will help in making the arrangements. Designate someone to co-ordinate the work. He/she will keep everyone to a timetable and will help in dealing with any problems that arise.

3. SET GOALS

What will be the goals of the retreat? These will form the foundation of the retreat. Some possible goals include orientation (learning about the group, getting to know one another), team building (learning to work together), skill building (developing communication skills, learning new leadership skills), personal growth, and long-range planning.

4. DRAFT A BUDGET

Determine how much money is available for the retreat. Will members be expected to contribute or will the organization pay for the retreat? Once the budget has been set, determine how much you want to spend for various items (e.g. lodging, food, materials).

5. SET A DATE

Determine the exact dates and length of the retreat. You won't be able to accommodate everyone, but try to avoid obvious conflicts. For example, an overnight retreat might be inconvenient for some members that have family responsibilities. If the retreat is held during the week, members may have conflicts with classes or work schedules. In general, try to avoid having a retreat near midterms, important events on campus, or holidays. It's a good idea to have at least one good "back-up" date in case the first does not work out.

6. RESERVE A LOCATION

Select a site that will meet your needs in terms of distance, cost, eating and sleeping arrangements,

meeting space, and recreational facilities. The more popular the location, the earlier you should make your reservations. Once the location is set, modify the dates of the retreat and your budget as necessary. Begin to think about the travel arrangements that will have to be made. If meals are not going to be provided by the retreat site, determine what eating arrangements you will have to make.

7. MAKE A QUEST LIST

In addition to your members, remember to include anyone else who might be critical in helping you to accomplish your goals, such as advisors or faculty members. Guests can be invited to attend all or part of a retreat.

8. CONTACT RESOURCE PEOPLE/FACILITATORS

Although your own group leaders and members will be the major participants in the retreat, it can be helpful to have someone from outside the group to help you in planning or leading the retreat. Possibilities include advisors, faculty members, administrators, alumni, community members, and church leaders. Student Life & Leadership Office also have staff available to help in planning your retreat.

9. SET THE FORMAT

Make a final agenda for the retreat. Make sure that this schedule relates to the goals you generated earlier. Other factors you should consider in the timing of retreat activities include total amount of time available, need for flexibility, number of people in the group, and amount of “work” time versus amount of “play” time.

10. MAKE TRAVEL ARRANGEMENTS

Make sure everything is in place for getting to the retreat. If members are responsible for their own transportation, prepare directions for everyone. If a bus or van will be used, make sure it is reserved. A good alternative is to arrange a carpool. If this option is used, be sure everyone is contacted to sign up.

11. SEND OUT INFORMATION

Notify your members and guests of the final arrangements. Provide enough information about the retreat so that people will be excited about attending. The notification should include a general agenda, dates, directions to the site, check-in information, transportation arrangements, and other special instructions (e.g. bring a bathing suit, supply your own beverages). If members are paying part of the costs themselves, tell them when and how their payments are to be made.

12. MAKE EQUIPMENT ARRANGEMENTS

If your group will need to have any special equipment (AV system, VCR, etc.), make arrangements to obtain it.

13. PREPARE MATERIALS

Arrange to have copies made of agendas, handouts, reading materials, or other things you'd like members to have available during the retreat. Also arrange for any other materials that are needed (e.g. pencils, markers, pads).

14. ARRANGE MEALS

Make final arrangements for meals or refreshments. If you are preparing your own food, be sure to arrange for buying, storing, and transporting the food, cooking and serving the meals, and cleaning up afterwards. Another option is a “pot luck” in which every member signs up to bring something. You might also consider eating at a restaurant that offers group rates. If you do this, be sure to make reservations.

15. SEND REMINDERS

Send out a reminder letter to your members and guests, informing them of any last minute changes and again urging them to attend. Also reconfirm any reservations that have been made.

16. ARRANGE FOR PAYMENT

If the retreat site needs payment in advance or at the time of check-in, arrange for the treasurer to have a check or money order ready. If you bank with Associated Students, Inc., be sure to allow them plenty of time to process your paperwork. If the retreat site will be sending a bill after the retreat, be sure it is paid promptly.

Of course, taking all of these steps does not insure a successful retreat. That depends in large part on your goals, your success in presenting your agenda, and the full participation of your members. However, following the steps listed here will insure an orderly process and will allow you to put more of your creative energy into planning an exciting and rewarding retreat.

RETREAT PLANNING CHECKLIST

1. THREE MONTHS IN ADVANCE:

Survey Members

Delegate Responsibilities

Set Goals

Draft a Budget

2. TWO MONTHS IN ADVANCE:

Set a Date

Reserve a Location

Make a Guest List

**Contact Resource
People/Facilitators**

3. ONE MONTH IN ADVANCE:

Set the Format

Make Travel Arrangements

Send Out Information

4. THREE WEEKS IN ADVANCE:

**Make Equipment
Arrangements**

Prepare Materials

Arrange Meals

5. TWO WEEKS IN ADVANCE:

Send Reminders

Arrange for Payment