



Retreat Planning Checklist

6 months before your retreat (ideally)

The group needs to discuss the following items together and build consensus built around the overall parameters of the retreat. The moderator will need to put this item on the meeting agenda and guide this discussion. He or she should NOT become responsible for the retreat itself.

When are you going?

Start Day: _____ Date: _____ Time: _____

End Day: _____ Date: _____ Time: _____

Who is in charge?

Retreat Chair: _____

Logistics/venue Planner: _____ (optional role)

Agenda/Schedule Planner: _____ (optional role)

Where are you going? _____ (general destination choice)

Establish overall retreat goals and identify priorities – bonding, Forum structure/process, new member integration, conflict resolution and play.

What are the plans?

What is the budget per member for the retreat? \$ _____

Will an outside facilitator be hired to direct content for the retreat?

Who: _____ Fee: _____

Where is the retreat being held? Cost: _____

What kind of travel is required? Cost and time: _____

What play activities are important for the group? Cost: _____



3 months before the retreat

These decisions will be made by the retreat chair/chairs with input from group but not should subject to voting each time.

- Book retreat location
- Create an agenda
- Book a facilitator
- Assign member “homework” if needed
- Determine any A/V needs and confirm with venue (flip chart, for sure!)
- Thirty days in advance, confirm accommodations
- Create a retreat evaluation form