

Retreat Planning Worksheet

This work sheet is designed to assist you step by step as you plan your retreat.

GOALS AND PURPOSES OF THE RETREAT

Choosing a Retreat Site/Visiting the Retreat Site

- How long does it take to get there?
- What kind of meal service is provided?
- How long does it take to serve a meal?
- Who will make the announcements and pray at mealtime?
- Will you be sharing the dining room with another group?
- Can you decorate the tables in the dining room?
- What kind of meeting room will your group be using?
- Can you move the furniture in the area that has been assigned to your group?
- How much can you decorate? Can you affix things to the walls? If so, with what?
- Will you be sharing the grounds with another group?
- Is the facility well lit and signed for nighttime arrivals?
- Where will you have registration?
- What staff will be available during your stay? Do you have emergency contact information for your entire group?
- How late in the evenings (especially arrival day) will staff be available?
- Will certain individuals in your group be able to navigate the facility (stairs, walkway, hills, etc.)?
- Is the facility warm or cold? It is usually wise to encourage layering for personal comfort.
- Is the facility clean or dirty?

CONTACT PERSON / RETREAT LEADER

At Transformations, we request to work with only ONE contact person/retreat leader, as this better ensures that details will be taken care of efficiently. Below are some items that the contact person/retreat leader should be responsible for.

- What policies and procedures do you need to know and to convey to the rest of the group?
- Are you prepared for 'special requests' from your group?
- Do you have all of your information handy (contract, room assignment sheets, activity sheet, emergency phone number)?
- Have you given your group a definite cut - off date for registration?
- Do you have any medically restricted diets or vegetarians in your group?
- Are you aware of anyone who will only be staying part of the retreat? Have you let your contact in the Retreats Department know about these people?
- Room assignment sheets: the retreat leader is responsible for assigning individual rooms and faxing these sheets into the Retreats Department one week ahead of time. Have you had time to fill these out?
- What time will you be arriving on the day of your retreat? Do you know what to do once you get there? Have you made arrangements for late arrivals if needed?
- How will you be handling payment for the retreat?

- What time are you planning to meet with your contact from the Retreats Department to settle up the bill and look over next year's contract (if there is one)?
- Does your schedule match the schedule that Transformations has for you? (Meal times, check in and check out times, any refreshment times, break times, use of common spaces, etc.)
- What is your realistic goal for the number of guests attending the retreat? Are you aware of anything that might affect the attendance?
- Have you provided a tax-exemption form, if applicable?
- Watch for possible inclement weather and make arrangements for those who might be fearful.

FINANCES

- What is the cost charged by Transformations per person?
- What are the speaker's travel fees and honorarium?
- How much are your supplies going to cost? (Decorations, treats, etc.)
- Have you had any promotional costs?
- How big is your phone bill for planning this retreat?
- Any miscellaneous costs?

*Budget for a profit. Remember, there are hidden costs that are above and beyond what Transformations is charging; such as your phone calls, postage, printing, speaker travel and honorarium, flowers, tips, scholarships, etc. Explain to your group what the cost includes so there are no surprises.

Total Cost \$ _____ (divided by) estimated number of guests _____ = Cost Per Person

REGISTRATION

**The following information should be on your Registration Forms, to be filled out before the retreat.*

- Deposit - The more people are committed financially, the more likely they are to show up at the retreat. You might want to require payment in full before the retreat.
- Home, Address and Phone - This information can be used for pre - retreat communication and for follow - up information.
- Roommate Requests - Individuals may request a roommate; thus helping you make rooming assignments.
- Registration Policies - Clearly state if deposit is refundable or not. Is the deposit transferable to another person? Is there a deposit required for those staying off grounds? Also, make sure all the people in your group know whom to contact for any questions they might have. If they call Transformations, we will most likely direct their calls to you.
- Miscellaneous Information - What are your group's transportation needs? Has anyone requested sleeping rooms near or far from elevators/stairs? Do you want to have any 'get to know you' information for a group mixer? Have you provided a space for any medical diets that they might have?

- Retreat Registration should begin 4 - 6 weeks before your retreat dates. One of our Retreat Coordinators will be calling and/or emailing you approximately 6 weeks ahead of time to start getting all the details together; and then periodically to make sure everything is going well.
- Registration at time of arrival: We suggest that you arrive early - at least one hour before the rest of your guests. Pick up the keys and any needed information from the front desk, and get yourself settled. Orient yourself to the location of the buildings, meeting room(s), dining room, etc. Usually, a group's registration is in their primary meeting room or in our main lobby; be prepared and organized. Have you let everyone in your group know that they need to arrive at least an hour after the scheduled check - in time so you can get prepared?
- As soon as possible, let your Retreats Department contact person know of any changes to the final count given a week ahead of time, such as room switches or no - shows. Unfortunately, unless they are given to Transformations a week ahead of time (or there is a medical emergency), we are not able to accommodate partial stays.