This checklist will help you prepare for a successful retreat. This list is not all-inclusive; add/remove items to meet your specific needs. Timeframes are recommendations for large retreats.

**Two to Four Months Prior to Event**

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| --- | --- | --- | --- |
| **Task** | **Who** | **Due By Date** | **Completed (✓)** |
| Define Purpose | Team Leader |  |  |
| Define Participants | Team Leader |  |  |
| Determine Budget | Team Leader |  |  |
| Form Content Planning Committee | Team Leader |  |  |
| Form Logistics Planning Committee | Team Leader |  |  |
| Choose Date/Schedule with presenters, facilitators, and participants | Team Leader |  |  |
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**One to Two Months Prior to Event**

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| **Task** | **Who** | **Due By Date** | **Completed (✓)** |
| Reserve Location | Logistics Committee |  |  |
| Reserve Equipment | Logistics Committee |  |  |
| Order materials, merchandise | Logistics Committee |  |  |
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| Define & Develop Content | Content Committee, Presenters, Facilitators |  |  |
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**One Month Prior to Event**

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| **Task** | **Who** | **Due By Date** | **Completed (✓)** |
| Order Catering | Logistics Committee |  |  |
| Confirm location, including layout & equipment needs | Logistics Committee |  |  |
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| Finalize Agenda | Content Committee, Presenters, Facilitators |  |  |
| Create handouts materials, presentations | Content Committee, Presenters, Facilitators |  |  |
| Create evaluation(s) | Content Committee, Presenters, Facilitators |  |  |
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**One week Prior to Event**

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| **Task** | **Who** | **Due By Date** | **Completed (✓)** |
| Checklist for what to bring | Logistics Committee |  |  |
| Pack/assemble materials | Logistics Committee |  |  |
| Finalize participant numbers; provide to catering, location, presenters, & facilitators | Logistics Committee |  |  |
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| Final Planning Meeting | Team leader; all attend |  |  |
| Confirm all is ready | Team leader, Logistics Committee, Content Committee, Presenters, Facilitators |  |  |
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**At the Event**

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| **Task** | **Who** | **Due By Date** | **Completed (✓)** |
| Sign-in participants | Logistics Committee |  |  |
| Welcome participants; Introduce presenters/facilitators | Team leader |  |  |
| Distribute & collect evaluations | Content Committee, Presenters, Facilitators |  |  |
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**Immediately Following Event**

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| **Task** | **Who** | **Due By Date** | **Completed (✓)** |
| Distribute thank-you notes | Team leader |  |  |
| Solicit feedback; document retreat experiences | Team leader, presenters, facilitators |  |  |
| Follow-up on any action items | Team leader, Logistics Committee, Content Committee, Presenters, Facilitators |  |  |
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