

# The Ultimate Guide for Retreat Planners: Planning A Retreat



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## INTRODUCTION

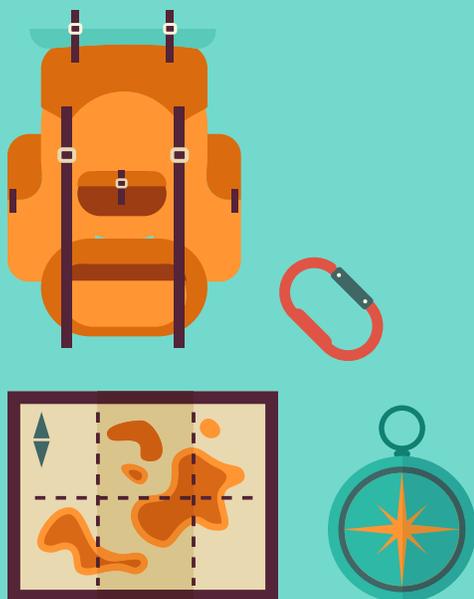
Planning a retreat can seem stressful and even intimidating at times. There are many tiny decisions to make and tasks that need to be completed along the way. The goal of this guide is to make certain that retreat planners have the tools needed plan and enjoy the perfect retreat without ever getting overwhelmed.

The Ultimate Guide for Retreat Planners was designed to break down and organize the many components of planning a retreat, offer examples and ideas that may spark inspiration in our readers, and finally, to help alleviate some of the stress and mess that comes with planning a retreat from start to finish. This guide takes readers from the first steps of getting support and putting together a plan/budget to the final stages of coordinating, promoting and finalizing last minute details for the retreat.



## Chapter 1: Getting Approval for the Retreat

If you are planning a retreat there is a good chance that you will have to get official approval. Before presenting your proposal, make sure that you have researched the details and have formed a game plan, including a preliminary budget. The more complete the plan is the more likely it is to be accepted.



# GENERATING ENDORSEMENTS/SUPPORT

A retreat is oftentimes exactly what a group or team needs to reach a common goal, learn to trust or respect one another, grow together and as individuals, learn to work together, become closer as friends or in the spirit, etc.

Sadly, many people don't know how beneficial a retreat can be and often don't know how to correlate a successful retreat with reaching formal goals. There are countless ways that a well-planned and managed retreat can benefit a small team or group.

### Ways That a Retreat Can Benefit a Group:

1. Retreats offer a nice get-away and change of scenery
2. Members often come back from retreats refreshed and motivated
3. Team members learn about themselves and each other
4. Trust, stronger relationships, and bonds are developed
5. Communication is improved
6. Allows for face-to-face time in a new atmosphere
7. You get out of your normal routine
8. Allows for participants to unplug from social media and technology
9. Gives participants the space and time needed for self-reflection
10. Allows a group or team to have some fun together!

When pitching a retreat for approval, make to have a plan that details specific information about the retreat, but also that enables executives or board members understand the purpose, benefits and implications of having a retreat.

### CREATING A PLAN

There are several factors that you must consider before asking for approval. The easiest way to present your ideas for approval is through a written plan.

### ESTABLISHING A BUDGET

When planning a retreat proposal, you can either request a budget before the proposal or after the proposal. It depends on what you or your organization prefers.

If no budget has been provided before proposing your retreat you should already have research prepared showing price ranges per location, activity, catering, events, transportation, etc. This way, when it comes time to ask for a budget there are no surprises and less opportunity for a low budget.

If a budget has been provided before proposing the retreat then the location, activities, transportation cost, etc. proposed should be within that budget. In this situation, proposing several options within the budget is best.

In some cases, your organization will not be able to support your full, or even partial budget. This doesn't mean that you have to miss out on an awesome retreat. There are plenty of other fundraising options.

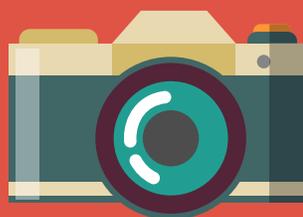
#### Ways to Fundraise:

- Host a Spaghetti Dinner, Car Wash, Bake Sale or Garage Sale
- Host an Event (Marathon, Block Party, Golf Tournament)
- Create GoFundMe.com Account
- Partner with A Local Restaurant or Organization
- Pay to Play: Trivia Night, Talent Show, Bingo, Scavenger Hunt
- Sell Merchandise (T-Shirts, Hats, Pens, Pins, Etc)
- Door-to-Door Fundraising



## Chapter 2: Planning Important Retreat Details

Retreat planning takes organization to ensure you have a successful event. From identifying a location, activities, and meal planning, as the “event planner”, you have a lot of decisions to make. The first important decision when planning your retreat is what type of retreat do you want to have.



### SELECTING A VENUE FOR THE RETREAT

Did you choose an area where your retreat must be and define your participating group? Retreats for an office team, group of friends, family, sports team, men's or women's group could potentially be completely different depending on the needs of the group.

It is important to consider participant needs like diet, allergy or physical accommodations. Once you understand what your participants need and can compare that to the experience you want them to gain, it is time to select a venue. Decide the specifics of your retreat, based on location, lodging, activities, goals you want to reach, etc. Utilizing a retreat location to its full potential not only is most cost effective but also provides a better retreat experience.

#### Specifics to Consider:

- Location
- Price
- Amenities
- Activities
- Accessibility/Restrictions
- Dietary Needs
- Lodgings

#### Type of Retreat:

- Men's Retreat
- Women's Retreat
- Youth Retreat
- Educational Retreat
- Family Retreat
- Team Retreat
- Office Retreat

### SELECTING A THEME FOR THE RETREAT

Once you decided on a place it is time to move on to selecting a theme. The most successful retreats have a theme that it's activities, discussions, games and other learning experiences can focus attention toward. Once a theme is decided, it is easy to pick a retreat title or activities based on that theme.

#### Men's Retreat Theme Examples:

##### **THE CIRCLE OF LIFE**

This men's retreat will offer a new perspective and fresh beginning for men who often get caught up in the stress of work and family life. Set smartphones and obligations aside and focus on life's ups and downs, the miracles worked in your life, and the ability to grow and learn from your current circumstances.

##### **SHARE YOUR STORY**

Often times men do not get the opportunity to be vulnerable or express themselves freely. Use a retreat as an opportunity to invite men to share their life stories in order to learn from others and grow comfortable in their experiences

#### Women's Retreat Theme Examples:

##### **PURSES AND PRAYER**

With a Purses and Prayer theme, you can remind women to take time out of each day for prayer or mindfulness. Each time a small memento, such as a keychain, prayer card, or stone, is stumbled upon in the purse, she is reminded to take a moment to say a prayer and take a deep breath before moving forwards.

##### **NIGHT AT THE "SPA"**

Because women are so often tending to others, they forget to take the time to take care of themselves. Many women feel guilty taking the time or money to go to the spa for a little pampering, but there's no need for guilt. Your body is a gift from God, and by taking care of yourself, you are better able to serve your family and your faith.

### Youth Retreat Theme Example:

#### **LOVE YOUR #SELFIE**

Society today tells us how we should look, dress, weigh, what colors and styles are popular, what products define us as rich or poor... For teens, who are already struggling to decide who they are and what defines them, self-esteem issues are rampant. The Love Your #Selfie retreat theme focuses on what children love and find unique about themselves, each other, and the team when they chose to work as a unit.

### Educational Retreat Theme Example:

#### **CHANGE OF VIEWS**

This educational retreat will create some uncomfortableness as trending topics and controversial issues are discussed. It will, however, provide an opportunity for people to share freely. Differences between participant's lifestyles or ideals may become known, but counter this with activities or discussion that unite teams and help them find common ground.

### Family Retreat Theme Example:

#### **MODERN FAMILY**

It's virtually impossible now for people to function without a smartphone. Calendars, schedules, lists, phone calls, and emails all live in one small device. A Technology and the Modern Family Theme can help family members regain control of the mental chaos these devices and our crazy schedules can create. Discussions about possible technology-free weekends, Bible and devotional apps, and other means of reserving time for family and faith are sure to create engaging debate and self-reflection.

## Chapter 2: Planning Important Retreat Details

### Team Retreat Theme Example:

#### **OBSTACLES ARE OPPORTUNITIES**

Teams will be faced with obstacles time and time again. Rather than allow obstacles to intimidate, discourage or halt growth, focus on discussion and activities that teach teammates to turn obstacles in to opportunities by problem solving, searching for multiple ways to find a solution, and help find opportunities to grow or learn from situations.

### Office Retreat Theme Example:

#### **SHARE THE VISION**

With this retreat theme, team members are shown how important they are and are given internal information about the companies past successes.

### More Theme Ideas:

- Specific Bible Verse
- Specific Song Title
- Gifts of the Spirit/Spiritual Gifts
- Personality Tests
- Self-Reflection
- Communication
- Friendships
- Self Esteem
- Making Choices
- The Life of Your Peers

### Catchy Theme Titles:

- Catchy Theme Titles:
- Solid as a Rock
- Living Life to the Fullest
- Getting/Keeping your Joy
- Reality Check
- WWJD
- What Next?
- Spiritual Journey
- Dealing with Stress/Loss Etc.
- MAD (Making a Difference)
- Moving from Fear to Freedom



## Chapter 3: Coordinating the Retreat

Once your event is planned, it is time to make all reservations. Start getting paperwork and other materials prepared for completion and submission. Once reservations are made, and the trip is finalized internally, start thinking of ways that you can promote your retreat. The better the planning and promotion the better the turnout. Oftentimes, the retreat location will have templates or helpful information on how to plan, reserve and promote your retreat.



# DESIGNING THE RESERVATION PROCESS

As a retreat planner, reservations need to be booked, events/activities planned, deposits paid, materials made, and several other tiny things that people don't realize go in to retreat planning. Here, we outline a few things to consider to help ensure that the booking and reservation process goes smoothly. Check your chosen retreat's website for reservation process forms and helpful info.

### Retreat Planners Must:

- Schedule/Hold Event Dates
- Read the Entire Contract Before Signing
- Make a Deposit If Necessary
- Download and Complete Paperwork
- Create a Calendar of Deadlines (Paperwork, Planning, Due Dates)
- Create an Event Schedule or Planning Worksheet
- Understand Insurance/Permission Form Requirements
- Ensure Forms Are Completed, Collected & Turned In
- Book Lodging, Common Areas and Schedule Events
- Equipment Rental
- Help Answer Participant Questions
- Assist in Communication between Retreat & Participants
- Turn in All Paperwork Completed by Retreat Specific Deadlines

### PROMOTING THE RETREAT

Promoting your retreat with informative and attractive materials will help ensure a great turnout, making your retreat a success. Check your chosen retreat's website for examples or templates for promotional items. However, when deciding on promotions consider what your team/group responds best to.

#### Printed Materials:

- Brochures
- Inserts
- Posters

#### Social Media Materials:

- Facebook Like & Event Pages
- Video or Presentation
- Emails or Evites

### MANAGING RETREAT SIGN-UP

Involved and prepared participants make for successful group retreats. Providing your guests with the helpful information will ensure that everyone is ready and excited for the event. Make sure to provide participants with not only the information your company needs returned, but also information promoting the retreat and instructions on how to sign up or go about getting there the day of.

#### Retreat Specific Material:

- General Information and Location
- Sign-up Information
- Retreat Activities/Amenities Page
- Packing & Preparation Checklists
- Planned Schedule of Events
- Guidelines and Rules
- Indoor or Outdoor Maps

#### Sign-Up Options:

- Verbal Sign-Up
- Reply by Email
- Sign-Up Sheet (In-Person)
- Company Website Sign-Up
- Online Sign-Up (Using Web Resources)
- Sign-Up Through the Retreat

The same way each team will need different planning, promotions and retreat material depending on the type of retreat and group, also consider which sign-up options are available for your retreat and is most convenient for you group.



## Chapter 4: Preparing for the Retreat

Now that you have completed the planning stages of getting approval, selecting a venue and a theme, organizing the specifics of your retreat, reserving your space, booking your activities, and sending out forms... you should be feeling pretty good and ready to move on.

Next up is to prepare for the retreat itself. As a retreat planner, it is your job to not only prepare the event but to also help participants prepare themselves for it.



### CHECKING LAST MINUTE DETAILS

As a planner it's your responsibility to prepare for the retreat in a way that lead to a successful event. Planning refers to the specific details of the event, making certain the necessary tasks are ready on or ahead of time.

The final preparation comes just a few days before the retreat when it is time to pick up materials, finalize travel, check the weather, double check your reservations, make sure all information has been provided, and to prepare the area for the arrival of your guests and activities.

**CHECK THE WEATHER** – check the weather to make sure that all activities, indoor or outdoor will be able to still take place. If there is even a slight possibility of bad weather, have a backup plan.

**TRANSPORTATION** – Arrange transportation if necessary, making sure to know who all will be traveling together. Ensure people traveling together stay together by sign-in sheets or headcounts.

**EVENT SPECIFICS** – Arrange pick-up/drop-off for Audio/Visual Equipment, Entertainment Equipment and Machinery, Arriving Talent or Vendor, Arriving Catered Food, Etc.

**PAPERWORK** – All releases, paperwork and payments should have been submitted two weeks prior to the event. However, it is important to check one last time, online or by calling, that all appropriate paperwork has been turned in and check in is ready as soon as participants arrive. Also, make sure that all paperwork that will be given to participants including schedules, maps, worksheets, etc. are packed and ready to go.

# COORDINATING PARTICIPANT PREPARATION

The responsibilities of the retreat planner and the retreat participant are obviously very different. That being said there are some common responsibilities when making final preparations. While the retreat planner needs to check the weather to make sure her events go as planned, a participant may want to check the weather when considering what to pack or travel time.

### Participants consider:

**CHECK THE WEATHER** – check the weather and relay this information to participants. If changes to the schedule have been made, or new items need to be packed for weather purposes, make sure to inform all parties right away.

**TRAVEL** – If no transportation is provided, offer to help manage group carpooling. Give information on date (to take off work, if needed) travel time, general directions, packing info, and parking info. Give tips for individual preparation like packing and car maintenance so that things out of your control are at the very least mentioned to participants.

**PERSONAL** – Get a babysitter or animal sitter if needed, take time off work, check weather, confirm travel time and traffic, pack, get all necessary paperwork (map, schedule, info), outfit or extra materials brought to supplement theme

**PAPERWORK & DETAILS** – Make sure that any paperwork that was supposed to be turned in got submitted. Bring any medical or special documents you may need. Bring any printed event or retreat specific details, including information from the website like maps, activities, menus, contact info, payment, etc.



## SUMMARY

Congratulations! If you've read through this guide you should be ready to start planning, or have gotten further in planning, your organized and successful retreat. There is a lot of information in this eBook, so just in case you missed anything we created this handy checklist. Feel free to print it out and use it as a guide while you plan your retreat!

# Planning A Retreat Checklist

- Research Retreat Options
- Decide Why to Host a Retreat
- Decide Who Participants Are
- Create a Plan:
  - What
  - Who
  - When
  - Where
  - Why
  - How
  - Goal
- Establish a Budget
- Get Approval
- Fundraise if Funding is Needed
- Select a Venue
- Select a Theme
- Select a Retreat Title
- Decide on Retreat Activities
- Plan Retreat Discussions
- Schedule or Complete:
  - Event Dates
  - Rooms/Lodgings
  - Pay Deposit
  - Rent Equipment
  - Schedule Food
  - Schedule Entertainment
- Complete/Send Paperwork
  - Insurance Paperwork
  - Permission Form
  - Contact Info
  - Organization Info
  - Invite Participants
  - Give Participants Important Info
  - Turn in All Required Paperwork
  - Set-Up the Reservation or Sign-Up Process
  - Promote the Retreat
  - Printed Materials
  - Social Media
  - Online
  - Prepare for Retreat Sign Up
  - Check Last Minute Details
  - Weather
  - Finalize Transportation
  - Secure Personal Details
  - Child/Animal Care
  - Forwarded Calls/Emails
  - Have Paperwork Ready
  - Help Coordinate Participant Preparation
  - Help Coordinate Participant Travel
  - Assure Everyone Arrives and Signs-In
  - Collect Final Payments from Participants
  - Bring I.D./Chargers/Clothes  
/Sanitary Items/Medications

## ABOUT THE AUTHOR

Refreshing Mountain is a year-round retreat and adventure center providing family friendly fun and refreshment for over 30 years in Lancaster County, PA. With multiple lodging types, hot buffet meals, numerous meeting rooms and a variety of on-site activities, Refreshing Mountain is the perfect destination for groups retreats of 20-450 persons. They also offer day event options that are great for corporate team building, school field trips and family outings. The retreat center is built on 80 acres of beautiful Pennsylvania woodland and is conveniently located just 25 minutes west of Philadelphia.

To learn more about Refreshing Mountain and their retreats, visit: <https://refreshingmountain.com/retreats/>



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