
PLANNING GUIDE

12 TO 16 MONTHS BEFORE RETREAT

Begin preliminary arrangements:

- Contact Bonclarken for pricing
- Determine your budget
- Pick a preferred date and several alternate dates
- Make reservations
- Add the retreat dates to your organization's events calendar

Assemble your planning group:

- Assign responsibilities
- Identify a group member to be your liaison with Bonclarken
- Define your decision-making process and chain of command
- Select someone to coordinate group communication

Define the vision for your retreat:

- Establish the purpose and theme
- Research speakers and/or multimedia resources
- Contact and arrange speaker/s
- Plan unique artwork to use in publicizing your event

9 TO 12 MONTHS BEFORE RETREAT

Plan retreat registration:

- Set fees based on your budget and set your timeline for receiving deposit and fees, giving discounts, etc...
- Decide whether the retreat will be self-financing or subsidized
- Set a flat fee you will charge all retreat attendees or create a fee schedule
- Allocate a portion of fees for contingencies, scholarships, etc...

Discuss retreat logistics:

- Create a rough schedule for your retreat
- Make arrangements with a recording services provider, if desired
- Review your contract and contact Bonclarken if you need to make changes

6 TO 9 MONTHS BEFORE RETREAT

Publicize your retreat:

- Create and distribute printed publications that advertise your retreat
- Publicize the retreat on your organization's website, Facebook page, etc...
- Hold informational meetings and collect names and telephone numbers of people interested in attending

Design your registration packet and database:

- Create a spreadsheet or database to organize all registrations, payments, etc...
- Gather information including:
 - Names and ages of all people being registered
 - Arrival and departure dates (if different from scheduled retreat dates)
 - Number of rooms needed (including cribs and cots)
 - Number of meals (including special dietary needs/food allergies)
 - Medical and insurance information and emergency contact information
 - Medical release for minors not accompanied by parent/guardian
 - Bonclarken recreation waiver
- You may also want to include the following in your registration packet:
 - Activity signups
 - Volunteer signups
 - T-shirt sizes

2 TO 4 MONTHS BEFORE RETREAT

Register and recruit attendees:

- Call people who have expressed interest
- Make registration forms available online and in print
- Follow up on partial registrations
- Begin working on housing assignments

Fill in the schedule:

- Evaluate equipment and seating needs for meeting rooms
- Plan handouts, computer presentations, and other resources
- Schedule volunteers for childcare, snack preparation, registration
- Verify recreation needs and times with Bonclarken through the Director of Guest Relations

3 WEEKS BEFORE RETREAT

- Return rooming list and meals sheet to the Director of Guest Relations
- Plan the setup/s for your meeting room/s with the Director of Guest Relations
 - Remember to designate a space to do registration and hand out keys
 - Talk about any changeovers or special needs during the retreat
- Send your schedule to the Director of Guest Relations
- Ensure that attendees are aware of check-in and check-out times and retreat center policies
- Discuss minimum guarantee with the Director of Guest Relations if necessary

1 WEEK BEFORE RETREAT

- Return final rooming assignments and meal numbers by the Monday prior to your arrival
- Confirm the time you will arrive and meet with the administrator on-call
- Update schedule if necessary
- Arrange for any last-minute needs

DAY OF THE RETREAT

- Arrive before group to set up registration and organize your materials
- Check in with the office to confirm final numbers, pick up keys, and discuss when you will make payment
- Meet with the administrator on-call to inspect meeting rooms and confirm setups
- Sort keys to distribute along with retreat information, schedule, t-shirts, etc...

EVALUATION AND FOLLOW-UP

- Survey retreat attendees
 - Location and facility
 - Food & snack offerings
 - Service
 - Program content and spiritual relevance
 - Did the retreat meet the original stated objectives?
- Compile a written report for use in planning future retreats
- Complete and return the Bonclarken survey
- Thank you notes to all volunteer staff who worked on pre-planning and onsite logistics