

Checklist for planning a successful retreat

Initial Decisions

- Who is responsible for planning the event?
- What is the purpose of the event?
- What outcomes do we want to achieve?
- What is the professional development component?
- Who is invited/expected to attend?

Agenda Decisions

- Who is in charge of the meeting?
- Who are the leaders/presenters of different parts of the agenda?
- What is the agenda?
- How much time is allocated to each item on the agenda?
- Do we want a facilitator? If so, what do we expect from the facilitator? Have we met with the facilitator?
- Who is the timekeeper?
- What is the element of fun?
- What assignments need to be made before the meeting?

Logistics Decisions

- Who is responsible for logistics?
- Where can we meet to be uninterrupted and comfortable?
- What food and treats do we want? Who will get them?
- What handouts are necessary and who gets them?
- What equipment is needed? Who is responsible for ensuring it works at the event?
- If we need name tags, who is getting them?
- Who is arranging the fun event at the retreat?

“Quality of the retreat” Decisions

- What will we do to involve everyone?
- What are we doing to make everyone want to attend?
- How are we ensuring the appropriate democracy during the event?
- What tools/techniques will help us achieve the purpose?
- What are the vested interests of the participants?
- How can the participants prepare beforehand?
- How are we starting the discussion before the event?