



# LefkoGroup

Corporate Retreat Facilitation & Executive Coaching Programs

## Off-Site Retreat Planning Checklist

Use the following questions to help you plan your off-site retreat.

### PLANNING

#### ► Purpose

1. What is the purpose of this retreat?
2. What criteria will you use to determine that the retreat was successful?

#### ► Participants

3. Who needs to attend the retreat?
4. Who supports the idea of holding a retreat?
5. Who is opposed to the idea?
6. Will all the key participants be able to attend?
7. How much time will they be willing to spend at the retreat?

#### ► Location

8. Where will the retreat be held?
9. Are the rules governing the use of the space acceptable?
10. Can the room be arranged as we want it?
11. Are the chairs comfortable?
12. Is there good control over lighting and HVAC?
13. Can we have food, snacks, and refreshments in the room?
14. Who will provide food, snacks, and refreshments?
15. Can we hang flip chart paper on the walls?
16. How will breaks and meals be handled?
17. Will overnight accommodations be needed?

#### ► Equipment

18. What equipment will be needed?
19. Who will provide it?
20. Who will operate it?

#### ► Facilitator

21. Do we need an outside facilitator?
22. Who will do it?
23. How much experience does the facilitator have with groups like ours?

#### ► Recording and Reporting

24. Do we want to record the meeting?
25. What kind of a retreat report will we need?

## DEVELOPING THE BUDGET

These are typical budget items for a retreat:

1. **Meeting space rental**
  - ▶ It is often possible to find meeting space at no cost if food or sleeping rooms are booked.
2. **Equipment rental**
  - ▶ For most retreats, equipment needs are minimal. In some cases, the facilitator will provide their own equipment at no additional charge to you.
3. **Supplies**
  - ▶ Look to the facilitator to identify based upon the nature of the format and agenda.
4. **Breaks and Meals**
5. **Facilitator fee**
6. **Participant travel, room and board**

## KEYS TO A SUCCESSFUL RETREAT

1. Good retreats, like any successful meetings, are no accident. They are carefully planned in great detail.
2. Use an experienced, skilled, facilitator.
3. Meet with the facilitator well in advance of the meeting to discuss the purpose and plan the agenda.
4. Make sure that the “right” people are willing and able to participate.
5. Clearly communicate the purpose of the retreat to the participants.
6. Make sure the room layout and setup is conducive to group discussion.
7. Make sure you have the equipment you will need, that it works, and that someone knows how to set it up and operate it.
8. Have plenty of coffee, water, and soft drinks available. Snacks help the participants keep their energy levels up throughout the session.
9. Make sure everyone knows the ground rules.
10. Keep the ground rules simple.
11. Clearly explain any group techniques, processes, and decision making tools you plan to use.
12. Use worksheets to facilitate group processes where possible.
13. Provide participants with background material and briefing papers prior to the retreat. Bring extras copies to the retreat.
14. Provide pens and paper for each participant.
15. Make sure you have a flip chart easel that is stable, along with plenty of flip chart paper and markers. It is easiest to use flip chart pads such as 3M® that will stick on a wide variety of wall surfaces without damaging them.
16. If you must record the discussion, arrange for a staff member to operate and monitor the recording equipment.