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# PLANNING GUIDE

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## 12 TO 16 MONTHS BEFORE RETREAT

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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

Assemble your planning group:

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

Begin Preliminary Arrangements

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

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## 9 TO 12 MONTHS BEFORE RETREAT

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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 NovusWay if you need to make changes

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## 6 TO 9 MONTHS BEFORE RETREAT

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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 registration information for 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
  - List of food allergies and dietary needs for attendees
  - Medical and insurance information and emergency contact information
  - Medical release for minors not accompanied by parent/guardian
  - NovusWay waiver
- You may also want to include the following in your registration packet:
  - Activity signups
  - Volunteer signups
  - T-shirt sizes

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## 2 TO 4 MONTHS BEFORE RETREAT

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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 activity needs and times with NovusWay Guest Relations Coordinator

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## 3 WEEKS BEFORE RETREAT

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- Return rooming list and Food Allergies/Dietary Needs to NovusWay Guest Relations Coordinator
- Plan the setup/s for your meeting room/s with the Guest Relations Coordinator
  - 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 Guest Relations Coordinator
- Ensure that attendees are aware of check-in and check-out times and retreat center policies

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## 1 WEEK BEFORE RETREAT

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- Return final rooming assignments and food service needs by the Monday prior to your arrival
- Confirm the time you will arrive and meet with the Guest Relations Coordinator if possible
- Update schedule if necessary
- Arrange for any last-minute needs

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## DAY OF THE RETREAT

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- Arrive before group to set up registration and organize your materials
- Check in with the office to confirm final numbers, pick up keys
- Meet with the Guest Relations coordinator to inspect meeting rooms and confirm setups
- Sort keys to distribute along with retreat information, schedule, t-shirts, etc....

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## EVALUATION AND FOLLOW-UP

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- 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 NovusWay survey
- Thank you notes to all volunteer staff who worked on pre-planning and onsite logistics