

RETREAT CHECKLIST

- ✓ Why retreat?
 - Goals, connections, relationships, shared initiative, planning.....
 - Have a solid, relevant plan
- ✓ What's the purpose?
 - Can vary year-to-year
 - **Examples:**
 - strategic planning
 - sharing progress
 - connect/celebrate/reaffirm
 - role clarification
 - setting direction
 - self-evaluation
 - major initiative
 - professional development
 - curriculum discussions
 - community engagement
 - team-building
- ✓ Set goals
 - What do you want to accomplish. Consider setting SMART goals
 - Communicate goals and ensure buy-in
 - Assists with planning logistics
- ✓ Key planning points:
 - Consider assigning pre-homework so participants are prepared and feel the purpose
 - Well planned agenda that has preplanned timelines
 - Review pacing and options for delivery to accommodate all participants
 - Consider offering leadership opportunities
 - Budget
 - Timelines
 - Location / facility
 - Facilitation
 - Attendees
 - Scheduling when there are pressing issues occurring
 - The 'right' team size – involve who needs to be involved
 - Calling it a “retreat” 😊
 - Not asking for feedback
 - Sit and Get – keep people tuned in and participating
 - Failing to set goals

GOOD LUCK & GOOD PLANNING!