

RETREAT BUDGET & PLANNING WORKSHEET

We prefer our clients give us two to three months lead time for planning retreats

Retreat Objectives

Length and Date of Retreat (one day, two day, etc. in October)

Ideal Retreat Environment (resort, hotel, B&B, rustic lodge, park, etc.) *The Wolf Group can make recommendations to meet your specific needs and Pricing.*

Type of Content Desired (fun team building programs, corporate training workshops, planning sessions) *The Wolf Group can make recommendations to meet your specific needs and Pricing.*

Number of Attendees (Departments/Divisions)

Training Topics and Activities *The Wolf Group can make recommendations to meet your specific needs and Pricing.*

Budget

Pre-Retreat Checklist

- Make reservations for lodging for retreat participants.
- Make reservations for retreat venue. *The Wolf Group can make recommendations to accommodate your needs.*
- Make food/snack arrangements
- Communicate retreat detail to attendees.
- Set-up transportation plan.
- Circulate retreat agenda and obtain final approval from key team members.
- Plan recognition/incentive gifts.

Retreat Checklist

- Provide attendees with a detailed itinerary.
- Meet with facility contact to ensure that catering is handled.
- Meet with facility contact to ensure that meeting or break-out rooms are set up properly.
- Have sessions videotaped (if applicable)
- Have events photographed (if applicable)
- Meet with *The Wolf Group* lead facilitator for an event briefing.

Post-Retreat Checklist

- Review post-program report *from The Wolf Group* with key team members.
- Plan any follow-up activities accordingly.
- Circulate photos or video of retreat (if applicable) to the team
- Obtain an evaluation of the entire retreat, and individual components of the retreat.

Budget Checklist

- Facility rental (guest and meeting rooms)
- Meals and snacks
- Travel for attendees
- Special activities costs (dinner cruises, golfing, etc.)
- Photography and or videotaping

Things to consider when planning an off site event:

1. Inclusivity
2. Meeting Location
3. Surprise or Not?
4. What's Included?
5. Meals and Snacks
6. Starting Time
7. Facility
8. Lead Time (We suggest 2 to 3 months notice)

Contact us at 877-408-8364 to answer any questions and to guide you through the steps.