

## RETREAT BUDGET & PLANNING WORKSHEET

Expected event results

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

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Training Topics and Activities

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Number of Attendees (Departments/Divisions)

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Type of Content Desired (fun team building programs, corporate training workshops, planning sessions)

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Budget

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### Pre-Retreat Checklist

- Make reservations for retreat venue.
- Make reservations for lodging for retreat participants.
- Receive and submit contracts.
- Make food/snack arrangements (note any dietary restrictions).
- Set up transportation plan.
- Order workshop and event materials.
- Circulate retreat agenda and obtain final approval from key team members.
- Communicate retreat detail to attendees.
- Plan recognition/incentive gifts.

## **Retreat Checklist**

- Meet with facility contact to ensure that meeting or break-out rooms are set up properly.
- Confirm meeting equipment and supplies are provided (whiteboard, easel, markers).
- Meet with facility contact to ensure that catering is handled.
- Schedule breaks throughout the day.
- Provide attendees with a detailed itinerary.
- Meet with facilitator for an event briefing.
- Have sessions videotaped (if applicable).
- Have events photographed (if applicable).

## **Post-Retreat Checklist**

- Review post-program report 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, A/V equipment)
- Food and beverage
- Travel for attendees (flights, taxi to/from airport, group transport)
- Corporate Training or Team Building program
- Special activities costs (dinner cruises, golfing, offsite meals, etc.)
- Photography and or videotaping
- Incentive prizes

## **Need Additional Assistance?**

Contact our Director of Guest Services at Bridge Bay at Shasta Lake for more information at (530) 691-7321