Human Resources Training and Development can help by collaborating with you to complete a needs analysis and then proposing specific activities and/or strategies to meet those needs. Contact us at your first thought of holding a retreat and we will work with you to insure your special day(s) is beneficial and memorable.

How to Plan Your Next Retreat

Retreats are a great way to begin strategic planning or help a department re-energize and reflect on its current strategic plan. Retreats can also help to get a group on track after a reorganization, or to celebrate success and plan for future initiatives. Whatever your reason for holding a retreat, there are some specific guidelines to keep in mind.

1. Determine the PURPOSE. Know what you want to accomplish during the retreat. Is it a planning session? Is it to train staff? Is it to simply re-energize the staff? Why exactly do you want to have this special meeting?
2. What are the GOALS for the retreat? How will you determine the day’s success? Some possible goals could be:
   a. Team building/collaboration
   b. Improved communication
   c. Planning/strategizing
   d. Problem solving
   e. Orientation/training
   f. Determining department goals and objectives
   g. Socializing and fun

About 2-4 months ahead, consider these items:
1. What kind of budget do you have? Items to consider
   a. Accommodation fees
   b. Food
   c. Transportation
   d. Speaker/consultant fees
   e. Prizes, mementos
2. Where will the retreat take place? On campus or off campus?
3. Who needs to attend? The entire staff or part of the staff? Mandatory or voluntary?
4. Will you need a facilitator, a presenter, a trainer, an outside consultant?
   a. What are their needs? AV, flip charts/markers, handouts, special materials, etc.
6. How long will the retreat be? Full day/ half day?
   a. Send out Save-the-Date notice to staff and invitees, including date, time, place, dress, etc.
**About 2 weeks in advance:**

1. Send agenda/invitation indicating PURPOSE and GOALS
   a. Include times for icebreakers, team-building activities and lots of breaks
   b. Identify beginning time, lunch break, and ending time on agenda
2. Finalize plans with facilitator/presenters.
3. Make final arrangements for food.
4. Arrange for AV equipment, make photocopies, and purchase trinkets
5. Establish registration process.

**After the Retreat** – It is important to find out how satisfied participants were with the retreat and how well you met your stated goals. Set aside some time in the schedule at the end for an evaluation. This can take the form of a short questionnaire, or you can put people in small groups. If there is not enough time, follow up in 2-3 days (can be an electronic questionnaire) with the following questions:

- Do you feel we met the objectives for the retreat?
- How did you feel about the facilities?
- How did you feel about our facilitator, presenters?
- How did you feel about (specific activity)?
- What was your favorite part of the day?
- What part of the day was the least helpful to you? Why?
- What would you like for us to be sure to include in the next retreat?

Whatever your reason for planning a retreat for your department, the key to a successful day is careful planning well ahead of time. Remember that a retreat is supposed to help you take a step back and refocus on your work, your processes, and your staff. Human Resources Training and Development is here to help you every step of the way. Give us a call when you’re ready to plan your next retreat!

Please contact the training team as far in advance of your event as possible! We will do our best to accommodate your request.

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