



Planning Calendar

Planning a retreat requires a checklist of supplies and activities, as well as staff members who will oversee each task. This planning calendar and checklist starts 1 year prior to the event, followed by intervals during which various actions should be undertaken to make the effort well organized and less stressful. When planning your retreat, who will coordinate the effort, making sure all tasks are accomplished? Who will perform specific tasks?

The planning activities described in this calendar generally apply to multi-day retreats. If you are planning a 1-day or virtual retreat, please modify as needed based on your plan and retreat agenda.

Lead Time	✓	Task	Target Date	Completed Date	Staff Member
PRE-RETREAT ACTIVITIES					
ONGOING		Schedule retreat with facility and confirm cancellation policy Note payment schedule Select 1 person to be in contact with facility Establish funding status/grants, philanthropy, in-kind donations			
1 YEAR		Update/print brochure Begin rolling registration			
6 MONTHS		Confirm each participant registration, add to participant roster Contact staff: <ul style="list-style-type: none"> – Volunteers – Nurses – Medical oncologist – Oncology chaplain – Special guest speaker – Yoga instructor – Massage therapists – Nurse observers (if applicable) – “Spouse/partner survivor” Brochure mailing and distribution: <ul style="list-style-type: none"> – Patients – Multidisciplinary team – Other organizations – Regional breast centers Order books (if using)*: <ul style="list-style-type: none"> – <i>Breast Cancer Husband</i> – <i>100 Questions & Answers About Advanced and Metastatic Breast Cancer</i> – <i>Couples Confronting Cancer: Keeping Your Relationship Strong</i> 			

*These books are examples of the types of books suggested for retreats; you can customize the list to fit the needs of your own retreat.

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3 MONTHS		Repeat recruitment effort as needed Confirm staff and observers Review agenda and objectives with speakers and facilitators Contact facility to confirm rooms for conference, massage, lodging Plan room layout for the discussion groups Prepare online survey Order or purchase supplies			
6 WEEKS		Conduct a pre-retreat phone interview with each attendee Send information to attendees: <ul style="list-style-type: none"> – Confirmation letter – Directions – Program description and expectations, packing list – Provide cell phone number of staff member for last-minute communication Ask staff about audiovisual and room layout needs			
2 WEEKS		Contact facility with final count of participants and staff, needs of participants (mobility or dietary restrictions) Print name tags Share all necessary retreat resources with staff <ul style="list-style-type: none"> – Program evaluation (extra copies) – Staff agenda with objectives and details – Additional forms – Participants' contact mailing list Prepare sign-up lists for massage/Reiki Assign staff to bring camera Assemble participants' folders: <ul style="list-style-type: none"> – Title page with donor name – Program evaluation – Objectives – Staff description Purchase (or secure via a donation) and assemble tote bags <ul style="list-style-type: none"> – Journal – Pen – Books – Personal items (optional; lotion, soap, chocolate, etc.) Place participant ID on each tote bag Attach name tags to materials Optional: Call participants to send out final welcome and answer any questions. (Often participants have changes due to progression of disease, reactions to medications, etc.) If using an online survey for the pre-evaluation tool, this is the point at which it should be sent to each participant			

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1 WEEK AHEAD		Review program content Hold a meeting with staff <ul style="list-style-type: none"> – Review participants by age, treatment, special needs, and information – Identify potential issues and resolution steps – Assign note-takers for various sessions Send staff directions and reminder of times Pack materials and equipment Confirm room arrangements, supplies, audiovisual equipment; correct as needed			
RETREAT ACTIVITIES					
DAY 1 OF RETREAT		Early arrival of staff and facilitators: <ul style="list-style-type: none"> – Tour facility and place signage for participants – Set up forms – Place materials and forms for easy access as needed Meet and greet participants: <ul style="list-style-type: none"> – Warmly greet participants at registration or if possible at front door – Answer questions, assess and relieve any anxiety, make participants feel welcome – Provide folders, name tags, directions, meeting time, and place Debrief staff after the introductory meeting and make appropriate course adjustments and plans			
DAY 2 OF RETREAT		Remind participants to complete sections of program evaluation throughout the weekend Set times for staff debriefing Set up room for evening gathering at dinnertime			
DAY 3 OF RETREAT		Set up closing program materials at lunchtime Collect program evaluations Ask for a participant to volunteer to take the lead on setting up a closed Facebook page for anyone in the group who is interested in staying connected after the retreat			

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POST-RETREAT ACTIVITIES					
POST-RETREAT		<p>Debrief with staff and observers</p> <p>Review pre- and post-surveys, program evaluations</p> <p>Share observations, feelings, suggestions</p> <p>Thank-you letters to staff and donors</p> <p>Evaluate program:</p> <ul style="list-style-type: none"> – Send online survey tool – Debrief with guest staff – Prepare for changes/edits based on feedback – Compile survey results for analysis – Create a summary document that describes the purpose, objectives, survey results, and photos (if appropriate) – Provide a copy to donor source <p>Secure results for future reference or additional use</p> <p>Update your event planning guide:</p> <ul style="list-style-type: none"> – Make notes of things that were most effective and those that require change – Update the timeline – Improve program, objectives, etc. <p>Provide nurse observer (if applicable) copies of all the documents used to replicate this retreat at their facility</p> <p>Update mailing list and email to participants</p> <p>Remind participants to complete post-retreat online survey if not completed</p> <p>Send a group email to participants:</p> <ul style="list-style-type: none"> – Remind the group that the retreat weekend may leave one needing time to review, think, and rest – Encourage communication among the group – Allow the group to take leadership for a post-retreat meeting – Advise participants to reach out to the appropriate contact at your institution if they would like to continue any conversations that occurred at the retreat 			