



## **OA Retreat Planning Guidelines**

Northern Virginia Outreach Intergroup

### **Questions to ask the facility hosting the retreat**

(If at all possible, a visit to the facility is a good idea)

- When are they available? (It can take several months to really pull off a good retreat, so schedule accordingly)
- What is the basic cost for lodging and meals (either per person or a flat rate)?
- What is included in the lodging? (some facilities provide beds only and registrants have to bring pillows and bed linens; whereas others provide full service)
- How large a group can they handle? (consider both lodging and meeting rooms for possible day-trippers)
- Is there a minimum number of registrants required?
- Who handles registration? (some facilities request that all registration be run through them)
- How many meeting rooms are available for workshops (if that is the desired format)? At what cost?
- Can they or their caterer meet the special requirements of an OA group? (be specific)
- Can we develop a menu for the caterer to follow? At what cost?
- What kind of beverage service is available between meals?
- Will they accommodate day-trippers? (Some facilities require that anyone attending for even a day pay the full price and eat only the food they provide, thereby eliminating unannounced day-trippers)
- Is there space for people to store/prepare their own food? Is this an additional cost?
- Is there a deposit required?
  - How much?
  - Is it applied to the final bill?
  - When is it due?
  - Is it refundable?
  - How late can we cancel and recover the deposit (or a portion thereof assuming it is refundable)?
- Beyond lodging and meals, do additional options exist? (pool, sound system, exercise room, etc)
  - How much for each?
  - What lead time is required to reserve an each option?
- What are our responsibilities as far as setup/clean up and meal prep are concerned?

### **Questions to ask yourself (IG) before setting the price**

(Assuming that IG has voted in favor of conducting a retreat and providing the funds for at least the deposit).

- How many people do you realistically expect to attend?
- What other options available from the retreat facility do you want to utilize?
- Is the retreat intended as a fund raiser or simply recovery outreach (where the aim is to either break even or limit the loss)?
- Can registrants come for only part of the weekend and stay in the facility? Do they get a reduced rate?
- Will single rooms be offered? Will they be charged more?
- Will day-trippers be invited? What will you charge (per day, graduated, flat rate)?
- Will scholarships be offered? Full or partial? How many?
- Will travel for out of town leaders be paid for (if that turns out to be format selected by the committee planning the retreat)?
  - How much will you cover? (Check with region for possible speaker funding as travel for board members to speak at retreats may be covered in their budget)



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### **Questions to ask once you have decided to hold the retreat**

(before you distribute flyers as some of this should be on the flyer / registration form, marked with an asterisk)

- If scholarship(s) will be provided, will a scholarship fund be set up using donations from other registrants? \*
- Will the format be structured by one or two leaders in an auditorium style or will it consist of workshops led by a variety of registrants (weekend or day-tripper)?
  - Will registrants be able to specify which topics they'd like to have workshops on? \*
  - How many separate workshops will go on simultaneously?
    - You will need someone other than the committee chair or registrar to lay out the workshop schedule.
- What service opportunities will there be for registrants? \*
  - Opening/Closing speaker / Workshop leader (abstinence requirements?)
  - Meal prep / setup / clean up
  - Activities coordination
  - Greeter/Hugger
  - Literature sales or other fund raising tasks (selling raffle tickets, coordinating silent auction, etc)
  - Decoration
- Will the format be based on a specific piece of literature (Big Book, 12 & 12, etc)? \*
  - Should registrants bring their own or will selected text be provided? (budgetary consideration also)
- Will there be theme/name for the retreat? \*
  - Centered on a specific aspect of recovery (spirituality, surrender, abstinence, tools, etc)?
  - Will the theme be based on the facility and its surroundings?
  - Will the theme be seasonal?
- How much free time will be provided in the program?
  - What time(s) will be set as free time?
  - What activities might be offered during the free time?
- Who will be the registrar and other contacts? \*
  - Phone and email for all contacts, including registrar needs to go on the flyer \*
  - It is suggested that the registrar not be the same person chairing the retreat planning committee. It is too much for one person.
- **Who is going to do the flyer?**

### **Budgetary Considerations**

(keeping in mind the aim of the retreat and the expected attendance)

The below assumes that IG accepts the cost of copying the flyers as part of regular operating expenses.

- Remember to include any travel allocation for out of town leaders in the budget if that was decided earlier.
- If it was decided that the aim of the retreat was fund raising...
  - Do you have a goal amount?
  - What activities will you plan to achieve this?
    - Raffle
      - What will be raffled?      How much per ticket?      Does the person need to be present to win?
    - Silent auction
      - What will be auctioned?      Who will handle items left over if no one bids?
    - Literature Sales?
      - What literature?      How much mark up?
    - How will the materials get to the retreat?
  - What is the estimated cost of fund raising materials (including services to produce materials)
- What will be provided to the registrants upon arrival (nametags, writing materials, program agenda, commemorative pens, etc.)?
- How much will be spent on decorations? (Set the ceiling and basic guidelines and let whoever is doing decorations run with it, not the committee chair)
- Will you need to provide signs to direct people to the retreat? How many and what size? Will they be made by members or professionally?



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### **Summary (Bottom Line)**

There is a reason that Region and WSO actually begin planning retreats/conventions two years in advance and engage numerous people to make them happen.

To plan and conduct a retreat, a committee of at least six people should be established, and they should enlist help from others (including registrants). This can be, though not limited to, members of the special events committee. It is also necessary for the members of this committee to communicate frequently and meet outside of intergroup. The time allotted to event planning at intergroup is insufficient to deal with everything that needs to be addressed in order to yield the desired results for a retreat.

The following activities would benefit by having a dedicated lead within the committee:

- Retreat Planning Committee Chair (Should not take on any more than one of the below positions, and strongly suggested that position be something other than registrar)
- Registrar
- Service coordinator
  - Program coordinator (get leaders and lay out the schedule)
  - Facility/Caterer liaison
  - Activities/Events Coordinator
  - Decorations
  - Fund Raising coordinator (if applicable)
  - Scholarship coordinator (If applicable – Registrar could handle in a pinch.)
  - Welcome packet / Program material coordinator (may or may not be needed depending on the complexity of the program, nametags needed at a minimum)