



Plan your network-building retreat

1. Identify a potential date for your network-building retreat.
2. Use the checklist to review the tasks that need to be done week by week. Fill in target dates by counting back from your potential retreat date. Write any notes or questions you need to follow up on.

Potential date for network-building retreat: _____

DATE	TIMING	TASK	NOTES
_____	12 weeks prior	Identify core planning team Identify potential stakeholders to invite Start regular planning meetings with core planning team, including other stakeholders as needed Update potential date for retreat	
_____	8 weeks prior	Draft event brief/agenda Confirm venue Finalize/confirm date(s)	
_____	6 weeks prior	Confirm invitation list Consider refreshments Send "Save the Date" email Begin planning group exercise	
_____	4-6 weeks prior	Finalize agenda/speakers Develop presentation materials	
_____	4 weeks prior	Reserve WebEx (if needed) Email invitation with agenda Review group exercises and plan a room set-up conducive to them	

DATE	TIMING	TASK	NOTES
_____	3 weeks prior	Gather needed on-site materials	
_____	2 weeks prior	Pre-retreat meeting: Confirm details including internal and external agendas, room set-up, directions, parking, refreshments, etc.	
_____	1 week prior	Send one-week reminder email Review RSVPs and consider seating Gather refreshments/supplies Confirm date & time with speakers Request presentation materials from speakers (PowerPoint, etc.) Print agendas and handouts Ship materials Exchange mobile numbers among planning team	
_____	1 day before	Send final reminder email Final walk-through meeting reviewing details and plans	

After the retreat

DATE	TIMING	TASK	NOTES
_____	1-2 days after	Send thank you email to attendees	
_____	1 week after	Develop retreat readout	
_____	1-2 weeks after	Send out retreat readout. Meet with core planning team to plan follow-up	