

Episcopal Conference Center Oakhurst

ECCO Retreat Planning Guide



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What You Need to
Know to Make Your
Conference, Retreat,
Family Reunion, or
Special Event a
SUCCESS

We hear it all the time... “Our group has never planned a retreat before, and we don’t know what to do.”

ECCO’s staff does know what goes into planning a group getaway. It’s part of our job –and our ministry- to help you achieve your goals, whether you’re aiming for a spiritual retreat or an educational conference, or taking advantage of our special knowledge and relationship with Yosemite National Park and the surrounding area.

Defining Purposes and Goals

The first step in planning any conference or retreat is to determine what you want to get out of it. Every conference or retreat should have a clear purpose, expressed in the form of specific goals. You really need to think about:

- What do you want to accomplish with your retreat, what is your message? Your goals must serve the overall purpose of your ministry, church, business or organization.

Defining these elements serves as the basis of your discussions and will drive the rest of the conference’s organization. Questions to ask yourself or you group are-

- For whom are we planning this retreat?
- What are the participants’ primary needs and interests?
- How are these needs and interests related to the overall purpose of the group?
- On what particular need or interest is the retreat intended to focus?
- What observable results will I use to evaluate the retreat’s success?



The facilities and accommodations you reserve, the speakers you select and the activities you plan all depend on your purpose and goals. You will want each element to make a clearly-understood contribution toward your identified purpose.

Not knowing an event’s specific purpose at the outset doesn’t mean you should scrap the event, but it does indicate you need to go back to your group and ask some questions. Even if you know the retreat’s purpose, it’s still good to review it one more time before planning begins. Your group will invest significant time, effort and funds into this retreat. You want to see that you receive the best possible return on the investment.

Step 1:

Define the purpose of your conference or retreat and establish the goals you need to achieve that purpose.

Communicating and Contracting-

Once you have determined your retreat's purpose and objectives, the next step is to establish communication with ECCO's Guest Services Department.

Determine what facilities and services you need to achieve your objectives-

Make one person from your staff responsible to communicate with ECCO's Guest Services staff. Having a single point of contact ensures that no wires get crossed and no communication is missed or duplicated.

- How many attendees do you expect?
- How do you want to house them (doubles, quads, singles, dorms)? This determines how many lodge rooms you'll need.
- When do you want to arrive and when do you want to leave?
- How many meals do you want? (i.e., from dinner Friday night through Sunday breakfast)
- How many meeting rooms do you require?
- Any other special requests you can identify (i.e., LCD projector, dry erase boards, easels, etc.)

"Why do I have to know all of this NOW, when my retreat isn't for nine months?"

We often accommodate more than one group at a time and must allocate our resources among all of you. Changes are sure to occur before retreat-time, but thinking about your setup well ahead makes coordination among groups simpler. For example, if you decide two days before your program that you need an LCD projector, we might not be able to supply one if other groups have requested all of them already.

Appoint a "Point Person" to be your ECCO contact

It's vital for everyone's sanity that your group select one person to communicate with ECCO. She/he should be accessible throughout all stages of the planning, development and execution of the event, including the day of arrival. Questions raised by members of the retreat team should be channeled through the appointed person, so that person is aware of group needs.

Arrange an ECCO tour

If you haven't conducted a retreat at ECCO before, it's very helpful to plan a tour with our Guest Services Department. Tours must be scheduled in advance, so you can be sure ECCO staff is available and that all the facilities you want to see are accessible. (Facilities in use by groups cannot be viewed.) You'll have the opportunity to acquaint yourself with your lodging choice, meeting rooms and the general layout of the facility, plus you'll be able to ask questions that come to mind as you discuss your needs with our staff.



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Meet all ECCO deadlines, per your contract

Our contract spells out certain deadlines groups must meet, including but not limited to:

- Deadline for payment of deposit and return of contract
- Submission of Certificate of Insurance
- Submission in writing of rooming assignments, meeting room requirements, and dietary restrictions
- Your retreat schedule (very important!)
- Remittance of final payment

Most of these are due no later than 14 days prior to the beginning of your retreat, but review your contract carefully and often to make sure you take all action required in a timely manner.

Effective communication with ECCO is probably one of the most crucial components of a successful program. Please don't hesitate to call us if you have any questions about any aspect of our collaboration with you.

Securing a Super Support Staff-

For all but the smallest retreats, a retreat coordinator's job is not to do all the work of organizing the event but to recruit, train and motivate the best people available to get the job done.

Before you can recruit folks, you need to identify how you're going to divide up the tasks that need to be accomplished as well as a timeline for accomplishing those items. Once you know what needs to be done, you can set about finding folks who have the time and commitment to see them through.



- Recruit qualified people who can afford to commit the necessary time before, during and after the event
- Develop detailed job descriptions and explanations
- Hold formal orientation and training sessions to acquaint each person with what is expected

A good way to spot qualified retreat staffers is to look for people who do or have done similar work for a living. Look also for people who have helped to successfully put together previous retreats. Develop talent for the future by assigning enthusiastic but inexperienced volunteers as assistants to experienced team members. Be sure they are given real responsibility under adequate guidance and supervision.

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Be especially careful in choosing speakers and counselors or small-group discussion and workshop leaders. These are the ones who will have the crucial task of communicating the retreat's core ideas and information to the attendees. Look for demonstrated excellence in both content and delivery. Most important, be sure your speakers and leaders are prepared to adapt their skills and materials fully to the objectives of the retreat.

It is essential that all volunteers understand the goals of the retreat and are united in pursuit of those goals. Be sure you understand them fully yourself before trying to communicate them to your staff.

Even for a smaller retreat, it is a good idea to build a team of willing, capable volunteers. The variety of their skills and creativity will be invaluable. Team building generates expanded ownership of the ministry, support through the project's difficulties, and a model of servant-hood for the attendees. It also lays the foundation for success in bigger events later on.



Staffing categories might include-

- Retreat Coordinator
- Registrar
- Speaker(s)
- Musician(s)
- Program Coordinator
- Promotion Coordinator
- Audio Visual Technician
- Counselors or Small-Group Discussion Leaders
- Follow-up Coordinator

Of course, not all retreats will require such an extensive staff. In most cases a single individual may wear multiple hats. Nonetheless all of these issues must be identified and planned for each event, and it is essential that someone be designated to coordinate each of them.

Of paramount importance to ECCO's staff as we work with you towards a super-successful retreat is to make **one person** from your retreat staff responsible for communicating with our Guest Services staff. Having a single point of contact ensures that no wires get crossed and that no communication gets missed or duplicated. For example, your audio technician should convey his/her needs to the designated retreat coordinator.

It is our pleasure to work with your staff to make your retreat and your stay at ECCO the best it can possibly be.

Setting Your Promotion in Motion-

The first essential of successful promotion is to set realistic attendance goals. If your goal is too low, you will likely contract for too little space and end up having to turn people away. If your goal is too high, you will contract for too much space and end up losing money on the retreat. Either way, you will have unhappy people and needless problems to deal with.

Look at attendance figures from previous retreats. Note any changes in your group or community that may affect attendance. Look also at how the focus or content of your retreat may have changed from previous years and how such changes may have affected attendance.

Once you've made your best estimate of expected attendance, your promotional goal is to reach that target.

Promotion should target those individuals most likely to respond to and benefit from the retreat and should communicate clearly and honestly for whom the retreat is designed, the purpose of the retreat, and essential information about the retreat: costs, program content and speaker.

Try to recruit three to five enthusiastic people who believe in the retreat and are willing to contact others personally. Draw up a list of potential attendees and divide it among them. Be sure to meet with your recruiters periodically to encourage them and monitor their progress.

Brochure Design

Brochures should be simple, well-designed and concise, including the following information:

- ☐ Retreat purpose
- ☐ Schedule & program information
- ☐ Speaker/presenter information
- ☐ List of items to bring (and what NOT to bring)
- ☐ Costs
- ☐ Registration form, including deadline
- ☐ Deposit information
- ☐ Any early registration discounts
- ☐ Cancellation policies
- ☐ Departure/arrival place and times
- ☐ Travel information and map
- ☐ Name and contact information of registrar

Avenues of Promotion

- ☐ Brochures
- ☐ Posters
- ☐ Telephone campaign
- ☐ Local newspapers/radio stations
- ☐ Sign-up tables
- ☐ Bulletin announcements
- ☐ Meeting announcements
- ☐ Mailers/flyers
- ☐ Church program supplements
- ☐ Email campaigns
- ☐ Website listings
- ☐ Facebook

Be sure to allow yourself plenty of time to promote the retreat. Every potential attendee should receive initial information a minimum of three months before the event begins. Be sure to set deadlines for producing posters, brochures and flyers—and don't forget to allow time for mailings to reach their destination.

In this age of computers and internet access, not to mention environmental awareness, you can save paper and cut promotional costs significantly by developing email promotions. It's easy to use a mail-merge to develop a flyer and, with a click of the mouse, send it out to your entire list at once. If your organization has a website or a social media page, advertise your event there and, if possible, make registration available online.

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Finance and Registration-

Two vital concerns affect the retreat coordinator's financial and registration plan. One is to set a per-person price that brings in enough money to cover all the costs of the retreat, or whatever portion of it the group has determined in advance will be covered out of retreat revenues. The other is to get all the attendees signed up, paid up, transported to the retreat site, settled into their accommodation and equipped with all the necessary information and retreat materials as efficiently as possible.

Remember, the registration process is the first item on your retreat schedule. It can get the event off to a good start or a bad one, depending upon how well it is handled.

Setting rates: The retreat coordinator must know **all** the retreat's costs and calculate per-person charges accordingly. It is a good idea to offer an early-registration discount as an incentive, but be sure to add in the amount of the discount you intend to offer after calculation all you per-person costs. This insures that you will cover costs even if all your attendees take advantage of the discount. Any who don't will provide you with a surplus to help pay the up-front cost of promoting your next retreat.

The most efficient way to handle reservations, and the one that most simplifies procedures at the beginning of your retreat, is to require pre-registration with payment in full three weeks or more in advance with no refunds. With this approach, all you do upon arrival at the retreat is hand out an information packet to each attendee. You do not have to handle money at the retreat. This may not work well if you have many whose schedule remains uncertain until close to retreat time, but it protects you group's budget in the event of cancellations.

You can provide scholarship assistance for attendees who need partial financial help. Look for anonymous supporters who are willing to contribute for this purpose.

ECCO charges per person	\$ _____
Honoraria	\$ _____
Speaker room, board, transportation and other expenses	\$ _____
Promotion	\$ _____
Supplies	\$ _____
Other Expenses	\$ _____
	Total \$ _____
Per -person _____	
Total \$ _____ Divided by (Number of Guests) _____ = _____	

Selecting a Registrar

For this vital task you will want a detail person, well-organized, good at accounting and panic-proof. This person will:

- Keep track of registration forms and make periodic reports to the retreat coordinator and promotion team.
- Collect all funds and make sure they are properly accounted for.
- Tour ECCO, if possible, and obtain all necessary information for assignment of attendees to lodging. Arrange for use of registration area.
- At registration, provide name tags, markers and information packets with lodging assignments, schedule, program outline, evaluation form and map of the conference grounds.
- Provide retreat coordinator with all information necessary for settling of final invoice.

Follow-up and Evaluation

One of the retreat coordinator's rewards for a well-planned and conducted retreat is seeing its impact on the attendees' lives long after the retreat ends. Effective follow-up and evaluation will strengthen that impact and help lay a foundation for the success of future retreats.

Retreat leaders should be assigned to do personal follow-up of individuals who have made decisions and those who are new to your group. During the retreat keep a record of those with whom personal follow-up should be done. Each retreat leader should contribute observations and recommendations to this record. Within a few days after the retreat, persons recommended for personal follow-up should receive literature, a phone call or best of all, a personal visit.



Staff Evaluation: Within a week after the retreat, the retreat coordinator should meet with the retreat staff. The agenda should include:

1. A discussion of how well the retreat met its objectives
2. Evaluation of the retreat facility.
3. Changes and improvements need for the next retreat.
4. Praise and prayer for the results
5. Compilation of a detailed file on the planning and execution of the retreat. This will be invaluable for future retreat planning
6. Setting a date to commence planning for the next retreat.

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Attendee Evaluation: Every attendee should be asked to evaluate his/her retreat experience. Keep the form simple and include ample space for comments. See the sample below.

PROGRAM EVALUATION FORM				
Program Evaluation Form				
Name of Event:				
Date(s) of Event:				
What did you expect from this retreat?				
What did you gain from this time?				
	Positive	Adequate	Needs Work	Remarks
Promotion				
Registration (Communication)				
Retreat Facility				
Lodging				
Quality of food				
Program (Schedule)				
Speaker				
Music				
Recreational Activities				
Overall Experience				
An area I would like to see the next reterat focus on:				

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Facility Evaluation Form:

After your retreat is concluded, it is vital that you get together with your group leaders to evaluate the success and/or failure of the program and facilities and how each could be improved for the next event.

FACILITY EVALUATION FORM
Name of Group:
Name of Leader:
Date(s) of Retreat:
1. What kind of event brought you here? Diocesan meeting_____ Retreat or meeting sponsored by your church_____ Work-related retreat or meeting_____ Other (please specify)_____
2. Are you here for the first time? Yes_____ No_____
3. What did you like most about ECCO?
4. What did you like the least about ECCO?
5. How likely are you to return to ECCO? I will most likely return_____ Undecided_____
I will not return_____ Why?
Please rate each of the following items: 5=Excellent, 4=Good, 3=Average, 2=Fair, 1=Poor, n/a=does not apply
_____ Overall Facilities
_____ Meeting Rooms
_____ Staff Friendliness
_____ Office Support
_____ Food
_____ Food Service
_____ Room Cleanliness
_____ Room comfort
_____ Grounds
Additional comments or suggestions:

Additional Tips to Help Make Your Retreat More Fun and Engaging

1. Develop an exciting and interactive program: This will help your retreat run much smoother and will also incorporate tons of fun. This will also ensure that everyone gets involved. The more people engage the more they will retain.
2. Choose a theme that connects to what you want to accomplish with your retreat. The most popular themes are often related to a bible verse, the time of year or a single word - Love, Renewal or Sisterhood. Sometimes the theme is just pure fun like "Pajama Party" or "A Day at the Beach". Whatever you choose, look for ways weave the theme into all areas of the retreat.
3. Keep it simple: Over thinking it causes headaches and unwanted stress. Also, the more complicated you make your retreat, the harder it will be for your staff to understand.
4. Allow space: Don't make it one activity after the next. Cramming will cause confusion and will make people feel tired and rushed. Give double the amount of time you think you need between program elements.
5. Balance the excitement, fun, and work: This creates interest and gets people involved by using different activities. Sitting in a room talking for more than 40 minutes without some form of physical activity can actually be a barrier for the creative process.
6. Focus on team bonding: The most important part of the retreat is to bring everyone together and make sure they stay that way after the retreat.
7. Take time to explore around ECCO. Ask our Guest Services staff for the "best kept secrets" to discover on the facility.
8. Draw out the quiet people: Encourage the talkative people to remain quiet. Don't let any one person dominate the meeting. Learn their names and ask them their thoughts by name. Equally helpful is to give them a task that will help them engage with other participants.
9. Disconnect from devices during your retreat: Some time away from technology is nice and makes sure everyone is paying attention and getting the most out of their retreat.



10. Don't forget the fun: Retreats should be fun. No participant should feel as though they would rather be somewhere else.
11. Keep the fun going after the trip ends: To ensure maximum results, the fun you have should transfer back into the day to day.
12. Have fun yourself: A happy planner is a happy group. Make sure you take the time to enjoy the beautiful surroundings and have time to reflect on your hard work.