

**Planning a Retreat**  
**©2016 Epiclesis Consulting LLC**

***Permission is granted to print the minimum number of copies needed for your own reference or to share with your retreat planning team.***

***All other rights reserved.***

***Please do not reproduce it for any other purpose or post the text on another website.***

A spiritual event will require some advance planning, even if all you do is hire a presenter to speak to a group of friends around a bonfire in your backyard. The thought of planning an event for spiritual growth can be intimidating, especially if you are new to the task. Hiring a presenter is just one of several steps you will need to take. The following guide can help you organize an effective, smoothly running event:

- **Define your group.**
  - Who is this event primarily for? What defines them as a specific group?
  - What do you know about the people in this group that might affect the type of activities they would find appealing and helpful? (For example, age, gender, educational background, spiritual interests, etc.)
  - Will the event be open to anyone outside this group? (For example, the Rosary Society may sponsor a retreat for its members but allow any adult member of the parish to participate.)
  - For members of the primary group, is the event mandatory? Recommended? Optional? Communicate this expectation honestly and clearly, both with the group and with your presenter.
  - What is the minimum number of participants you will need in order to consider it worthwhile to hold the event? (See below for how budgetary concerns may affect this number.) What is the maximum you can accommodate? (Consider advance registration, with a limited number of spaces available for walk-ins.)
- **Recruit support!**
  - One person can usually manage to arrange a backyard bonfire (assuming this one person has basic fire-building skills and an email address to contact a presenter), but a complex event with multiple presentations and activities may require the work of a committee. If you find yourself individually responsible for planning your group's event, don't panic! Appoint reliable people to handle specific areas. For a large retreat, these people may even need to recruit a team to help them exercise their responsibilities. Make

sure you stay in communication with these team captains throughout the planning process.

- Some areas for which you may want to consider appointing captains (depending on the size of the retreat, some of these duties may be combined, or you may add others):
  - meals/refreshments
  - office details (photocopying, registration)
  - publicity
  - finance
  - hospitality
  - set-up
  - clean-up
  - prayer support
- The last item listed in the above point deserves a few words: Consider recruiting people who are not participating in the retreat itself to support the event with their prayers. For a church community, this is an especially good ministry for shut-in members. Perhaps you could give a sign-up sheet to the ministers who visit the homebound in your community. If possible, recruit “prayer warriors” to support you during the planning process, as well as people who can commit to praying during the retreat itself for the success of the event.

➤ **Establish a budget.**

- Although you may revisit this topic as you consider other factors, it is important to determine early in the planning process at least approximately how much money will be available for the event as a whole, because this will affect all other decisions. Remember that in addition to paying the presenter, you may need to pay for photocopies, a venue, refreshments, and any extras your group may want such as T-shirts or keepsakes.
- Decide how much you are willing to charge participants. If it is open to people outside the primary group, you may decide to offer a discount to group members. You may also decide to budget a “scholarship fund” for people who would benefit from the retreat but cannot afford the fee. In some cases, your group may choose to fund the retreat at no charge to participants.
- If you decide to accept “free will donations” rather than charging a set fee, be prepared to pay the entire cost of the retreat from other sources of funding in case participants are less generous than you had hoped.
- How much will come from the group’s own treasury? (This may be either a flat amount or a figure “up to” which the group is willing to pay if necessary, with the hope of reducing that cost by donations and/or participant fees.)

- Are there potential sources of funding other than the treasury or participant fees? For example, would the event qualify for any grants, or be included in the budget of a broader organization?
  - Are there any expenses that can be reduced by soliciting donations? For example, group members might be asked to bring refreshments, or a benefactor may have offered to pay the presenter's fee. Often, much of the non-presentation labor is provided by volunteers, but it is important to allow the participants to concentrate on their spiritual enrichment; don't make them spend too much of their own retreat setting up and cleaning up!
  - If part of the budget comes from a participant fee, what is the minimum number of participants you will need in order to pay all costs of the event? (It is strongly suggested that you require this number of advance registrations at least several days before the event.)
  - Who will physically pay the bills? Does the group have a formal treasurer who is a signer on the group's checking account, or will someone need to make payments personally and be reimbursed? Is there paperwork that will have to be submitted? Make sure you know this process before any expenses are incurred.
- **Select a presenter.**
- For some retreats, you may have an "in-house" presenter who would be a good choice. However, the saying, "A prophet is not without honor except in his own country" was probably an old one by the time of Jesus. You may generate more interest among participants if your budget allows you to bring in an outside presenter.
  - Naturally, Epiclesis Consulting would like to encourage you to choose Trish O'Connor as your retreat presenter. Explore the other pages at [www.epiclesisconsulting.com](http://www.epiclesisconsulting.com) to get a feel for whether she might be a good "fit" for the kind of event you are planning.
  - It is best to contact a potential presenter as early in the planning process as possible. Many have busy schedules, and you will want to be sure of availability before you have committed to a specific date. Also, a presenter may have useful suggestions regarding your intended focus, as discussed next.
- **Choose a focus. (*You may want to ask your presenter for some help with this task.*)**
- Who ultimately has authority to make decisions about the spiritual focus of the event? To whom might the authoritative leadership have delegated responsibility to make and/or implement these decisions? If some decisions are shared, what is the plan for communicating with each other before investing too much effort that will have to be undone? (You do not want to get halfway through the planning process for a church retreat only to discover that the pastor has a completely different vision of its purpose.)

- What need(s) is the event intended to fulfill? (For example, a retreat for parish council members may be intended to give the individual members some time for spiritual refreshment, to form the council as a whole into a cohesive ministry team, and to guide the council in setting priorities for the coming year.)
  - If there is more than one need intended, which is considered most important by the authoritative leadership of the group? Which is likely to be most important to most of the individual participants? For example, the pastor may prioritize forming a team while the participants prioritize their individual refreshment. (There is nothing wrong with the fact that these may not be identical, but they must at least be compatible, as the presenter will need to deal with both.)
  - What phrase or short sentence summarizes the intended topic of the retreat? You will need to communicate what it is you want, but then the presenter may be able to help you think of a “catchy” way of saying it that you can use when publicizing the event to potential participants.
- **Select a duration.**
- Consider the scope of the intended topic and the schedules of the participants, as well as your budget.
  - Some typical models for spiritual events:
    - Evening session (especially popular for busy people, usually 1½-2 hours)
    - Mission (a series of evening sessions, with either the same or a different presenter for each)
    - Half-day of recollection (3-4 hours in the morning or afternoon)
    - Full day of recollection (6-10 hours)
    - Overnight retreat (usually one full day and a few hours of another day, with time for sleep between)
    - Full weekend retreat (usually Friday evening through Sunday morning, with two nights for sleep)
  - Speak with your presenter if you would like an event that does not fit into one of the above categories. Creative scheduling is often possible.
- **Prepare a venue.**
- Most geographic areas have nearby venues available for rent, such as campgrounds, banquet halls, and retreat centers. You may also have other facilities available, such as at a church, school, or park, which may or may not charge rent and/or a refundable cleaning deposit. Depending on your group, you may even want to consider a conference center at a hotel. Many hotels offer group rates and have conference rooms available for rent.
  - The ideal venue will
    - set a boundary between participants and life’s distractions

- fill the senses with stimuli from artwork, architecture, and nature that turn the mind and heart toward spiritual concerns
- offer suitable spaces for all the planned activities, such as a comfortable lecture space, a church or chapel for communal and private prayer, a pleasant outdoor area for reflection, private spots for individual journaling, and separate areas for small discussion groups
- have suitable facilities for serving and consuming food and drinks as appropriate to the length and time of the event
- for longer retreats, provide facilities for exercise and recreation during “off” time
- have enough space and bathrooms to accommodate the maximum number of participants comfortably
- offer any audiovisual aides the presenter may need, such as a blackboard or a sound system (check with the presenter)
- for any event longer than a single evening or a multi-evening mission, have somewhere the presenter can be apart from participants between talks
- be conveniently located for the participants
- charge fees that fall within the budget for the event
- A spiritually profitable retreat may be held in a venue that is not ideal, but it is good to explore options early in the planning process rather than immediately “settling” for whatever room happens to be free.
- A single large room, such as a parish hall or a school gym, can often be creatively divided to provide different spaces as needed.
- You will need to balance the convenience of using a familiar space with the value of a change of scenery. Keep in mind that it is particularly difficult for people to find spiritual refreshment in a location where they normally work. For example, the parish hall may be a perfectly fine venue for a parish mission, but a non-ideal venue for a retreat for parish staff. You may be able to make a familiar space feel fresh by doing some temporary decorating, but this will add both time and expense, thus reducing what you save on venue fees.
- There is also a balance to be struck between comfort and simplicity. The best retreat houses have always been those that simultaneously observe two venerable traditions: sacrifice and hospitality. For example, for an overnight retreat, you may not want a venue where participants have to sleep on a hard floor, but you may also want them to give up some creature comforts as part of the retreat experience. A retreat center with simple bedrooms and no televisions might fit the bill.
- At the risk of stating the obvious, don’t forget the presenter! The fee listed is for presentation only; the presenter’s accommodations, if needed, must also be paid by the group. For an overnight retreat,

the presenter will require a private room, even if the participants are sleeping in a single room. This is as much for your participants' comfort as the presenter's. Trish has a history of not sleeping the night before giving a retreat, and may need a place to pray and pace! (This is probably true for many presenters.)

- Be sure you know the details about your arrangement with the venue well in advance. Will your group need to pay a deposit? Do you need to guarantee a certain number of guestrooms? Will you have access to all facilities, or only certain ones? Are there any parking restrictions your participants will need to know about? Are there any spaces where refreshments are not allowed? If the venue also serves as the home of a Religious community, are retreatants welcome at the residents' communal prayer? If so, what is the schedule? Consult your presenter about whether this would be desirable in the context of your specific retreat.

➤ **Get it on the schedule.**

- In today's busy world, the earlier you get an event on everyone's schedule, the better!
- You will need to find a time that works for the venue, the presenter, the participants, and any support personnel (paid or volunteer) such as decorators, caterers and clean-up crew. Don't forget the prayer partners!
- Even after all these groups have committed to the event, it is a good idea to confirm a couple of weeks or several days before the scheduled date.
- Have a cancellation plan in place. Consider under what circumstances you might need to cancel, such as severe weather, and how you will notify everyone who needs to know. Know in advance what expenses will be lost and what can be refunded in the event of a cancellation. (It is the policy of Epiclesis Consulting that 50% of the presentation fee be paid upfront as a nonrefundable deposit.)

➤ **Administer amenities.**

- Again, try to balance simplicity with hospitality. You need not provide participants with all the comforts of home, yet you may want to offer some comforts NOT found at home. For an overnight retreat, for example, a sachet of bath salts and a CD of mood music might facilitate an evening of quiet reflection after the last talk of the day is over.
- Speaking of music, determine what your group can offer in the way of live music for prayer or reflection periods, and communicate this to the presenter early in the planning process. If you have a group that includes no musicians and is likely to be uncomfortable singing even simple songs a capella, then say so; this will affect the presenter's decisions. Find out what kind of audio system is available.

- Find out from the presenter what items the participants may be asked to bring, such as a Bible, or a notebook and pen for journaling. Communicate this information to participants, but have some of these on hand in case anyone forgets.
- Also speak with the presenter about any materials that will need to be photocopied. If at all possible, offer to photocopy handouts if provided with originals, and give a deadline that will allow you a reasonable amount of time to do so. Sometimes, the presenter may be willing to sacrifice the cost of doing her own photocopying in exchange for the flexibility of tweaking the design of handouts up until the day of the retreat, but normally the group sponsoring the retreat is responsible for copies, either by making them in-house or by reimbursing the presenter for copying fees, over and above the presentation fee. Remember, if you allow walk-in registration, you will need to have extra copies available.
- Spiritual growth can be hard work, and it can make people surprisingly hungry! Try to offer more good food than you think you will need. It should be possible for participants to choose healthy, nutritionally balanced options, but try to have some “comfort food” available, too. Have a plan in place for what will be done with surplus food so that you do not feel it was “wasted.”
- Be sure you know who is responsible for taking care of logistical details, and have backup plans in place in case something goes wrong.
- Depending on the venue you select, some of these details may be handled for you. Make sure you know what is included before you duplicate efforts, and do not hesitate to make this part of your decision-making process as you choose a venue. There is nothing wrong with passing over an otherwise lovely retreat house because they have bad food or drafty rooms. All factors deserve to be weighed.

If it sounds as if organizing a retreat is hard work, that’s because it often is! However, the more you sweat the details in advance, the more the retreat will seem to run itself when the big day arrives. An event that runs smoothly is always more effective than one that must be constantly thrown together “on the fly,” so invest the time and effort it takes to make your group’s event go well!