



**HEARTLAND**

# **Retreat Planning Guide**

**WHAT WILL YOU DISCOVER?**

**Updated: 2020**

# Guidelines for Great Events



## So, you are having a retreat!

It would seem that a relaxing get-away or a fun-filled excursion to a remote site would be an easy task, yet planning and preparing for a quality event takes forethought and diligence. Usually the full weight of an event falls on one key person and can be quite overwhelming. The purpose of this Retreat Planning Guide is to assist you in the various steps towards having a fabulous event.

### **Guideline 1:** Why? The Purpose

The primary issue that needs to be established is 'why are we having this event?' Stating the purpose goes a long way to focusing in on what needs to happen at the event. Ben Franklin said, "Living without a goal is like shooting without a target." Some people aim at nothing ... and hit it!

- A. List the Major Objectives of the event.  
By listing the objectives, you have a measurement device to evaluate each part of your planning as to how it interfaces with your overall desires for the event. Your objectives need not be lofty. Some groups have stated one of their goals for a retreat was to 'totally kick back', allowing the participants to 'veg out' with little or no planned events. While they had meal and snack times, the planners merely provided suggested areas of supervised entertainment during the day, but the attendees could sleep in, stay up late or be enthusiastically involved by their own choice.
- B. Define Your Objectives in one or two word targets; such as, relaxation, inspiration, or fellowship. After each major objective is established, write a one sentence goal for that area, IE: Relaxation – we want to provide a schedule that is not rushed, but allows for ample 'down time' to rest and kick back. Make sure your objectives are specific so you can evaluate how well you achieved each one after the event is completed.
- C. Write Down major events and activities to accomplish your objectives.  
For example: A group with a goal to develop leadership opportunities may select a facilitated activity from the many programming options Heartland offers to solidify the team and learn basic leadership skills. It is extremely important to have actions and activities that point toward achieving of your objectives.

### **Guideline 2:** Where? The Location Of The Event

Where you are hoping to have your event will dictate many factors of your planning. Heartland's calendar fills up months in advance, so securing your date is essential. Your housing, meals, activities available, etc. all hinge on the retreat location and date. When choosing your date, consider any potential conflicts with other events that may affect your participants' attendance (holidays, etc).

After receiving the contract, please sign and initial the contract and remit a 20% deposit to secure your date on Heartland's calendar. Changes and updates can be made over time, but your deposit and signed contract guarantees a site and time for your event. Please check in regularly with the Heartland Guest Services Department with questions, ideas and changes so that everything and everyone will be prepared for your event.

### **Guideline 3: How Much? Budgeting For Your Event**

There are many factors that enter into the planning of your event at this stage. You will have an estimated cost per person to enter into your equation. You must also consider the following:

- A. Honorarium/Travel Expenses for speakers, musicians.
- B. Materials expense for games, activities, group t-shirts, etc.
- C. Advertisement, mailings, printing costs.
- D. Cost for chaperones or helpers.
- E. Transportation to and from Heartland.
- F. Miscellaneous expenses

It is good to add in a couple of dollars per person just as a 'safety cushion' for unexpected expenses. After arriving at a total cost for the event, then you can easily calculate a 'per person cost' to charge your participants.

For larger, more expensive events, fund-raisers or scholarship programs can be put in place since you have allowed adequate lead-time to prepare for your event. Planning one year in advance is great, but sometimes it is not possible. A shorter preparation time means more must be done in a narrower margin of time. **Remember – good planning produces great events.**

### **Guideline 4: How? Promoting The Event**

All the planning to this point has been largely "behind the scenes", but now promoting and advertising the event moves into the foreground. You have the ability to answer key questions at this juncture, such as: when, where, why and how much. Now is the opportune time to advertise the event and then **keep the retreat before the eyes of all involved on a regular basis.**

Engage your planning team to develop a catchy theme phrase or logo for the event, one that captures the 'why' objectives of your group. If this is a youth or children's event remember that the major key to success is in the parents. Parents need to be completely and fully informed at the earliest possible time and in a variety of ways. Their support is crucial to the success of an event involving their children. One announcement in a bulletin or newsletter is never adequate to gather people to an event. **Social media, email blasts, posters, personal recruiting committees, post cards, and phone calls** are all great ways to get the information out. The more ways you communicate the details of the event, the greater possibility of success. **Use a "countdown" type of reminder as well – "Just 6 weeks till Youth Blast!"**

As you look at the scheduled date for the event, establish a registration date deadline and early registration discounts, etc. to get people financially committed to the event. When a person is financially committed to a retreat they are less likely to let other things hinder their attendance. (Know what cancellation policies are in place.)

### **Guideline 5: When? Nearing The Event**

Communication is pivotal to the success of an event. Communication with the Heartland Staff will help at all levels. The Food Services Director needs up to date information on your dining numbers. The Site & Facilities Manager needs accurate information as to how your facilities are to be readied for you. The Program Director needs Heartland facilitated activity requests (such as high ropes, swimming pool, or other indoor/outdoor activities) and estimated participant counts **no less than 30 days in advance** of the event to help plan available activities to fit your group's goals and size. The Housekeeping Team needs to know what rooms and areas to have ready for you. As you see, communication is very important to us here at Heartland to help make your event a success. **Communicate your group's needs or any changes to Guest Services no less than 14 days in advance of the event.**

You will receive a copy of **Heartland Policies and Guidelines**. From mealtimes to ground rules, everyone needs these items communicated to them **it is imperative that you communicate these policies and guidelines with each leader, chaperone and every guest that will be attending your event at Heartland** to ensure a safe and fun event.

### **Guideline 6: What? After The Event Follow-Up**

It is always important to check up on an event afterwards to see 'how you did.' Evaluate as a team what was right; what was wrong, what could have been better, etc. Heartland also would like to know how we served you and in what ways we can improve.

Heartland Conference Retreat Center is committed to making your event the best ever. All of our resources, planning ideas and expertise in events are at your disposal. Call us, drop by for a tour or visit, and email us often.

# Timeline for Your Event



## You have a retreat happening ...what does Heartland need from you?

In order to help the Heartland team operate most efficiently and to best serve you, communicating your group's needs to us clearly and accurately well in advance of your event date will help to ensure that your site will be ready upon your arrival with everything in place as you need it.

### *Facility Usage*

We have a lot of different groups in throughout the year, and usually multiple groups on any given weekend, so we need to know accurately your building and set up needs. For example, if you need breakout rooms for small group discussion or classes and have not communicated that to us as you have planned and developed your event schedule, we may have no rooms available because other groups have reserved them. We need to know specifics of what you will need, including outdoor recreation areas, fields, basketball courts, etc. Multiple groups on the grounds at the same time necessitates that our staff knows the areas you wish to use, so that we can coordinate needed access to an area with all groups concerned or to work out other arrangements. Send us a copy of your schedule as soon as you have a draft made. Our dining room operates around certain hours - be sure to check with guest services about your meal times before publishing your schedule.

***Keep Us Apprised*** of changes happening with your event. For example, if you were originally expecting 40 people, and suddenly your registration had exceeded 60, let us know. We may have to make adjustments with scheduling meal times, ordering food, Heartland facilitated programming, etc. Also, we need to be sure your accommodations will meet your group's needs.

### *Final Count*

This will require advance planning on your part, but **we must have a final count of your numbers no later than 14 days in advance of your date**. We have to order food for your group, and adjust any set up preparations and staff to meet the needs of the number of people your group will be bringing. Set your cutoff date for registration at least 2 ½ weeks before the scheduled event date.

### *Set Up Information*

Receiving your set up information in a timely fashion helps us plan for your group, and assign staff to site preparation. Please understand that we sometimes begin set up procedures a week in advance of your group's arrival - last minute changes may result in a significant delay if we are serving the needs of multiple groups on the grounds. It has been our experience that **designating one person to be the primary contact** regarding your group's retreat needs will reduce the occurrence of missed, forgotten or non-communicated requests for your group's event (which we may not be able to accommodate at the last minute, once you are on the grounds.) We have found that details or changes discussed with committee members, secretaries, etc., are sometimes not conveyed to Heartland if one person is not designated with this specific task.

### *Other Items to Consider. . .*

- Consider a deposit for the event: people are less likely to back out of a commitment once they have placed financial resources toward attending an event.
- Does the facility you are using come complete with linens, or not? If you have selected a building that does not come standard with linens, Heartland offers linen packets, available for a small additional fee (The packets contain a top and bottom sheet, blanket, pillow and pillow case, bath towel, hand towel and wash cloth). Contact Guest Services for pricing and options.

- Set your registration cut off for 2 – 3 weeks before the event date so you can get the information we need to us on time. You can almost always expect a few registrations to show up late - consider offering an early bird discount, or adding a late fee past a certain date.
- When setting a “price-per-person” amount to charge your participants, figure in an extra dollar or few to allow some “cushion” to cover incidental expenses. For example: promotion, guest speaker, handout materials, pool rental, damages (good idea for youth groups ☐), discounts, etc.
- Be sure to plan alternative activities in case of inclement weather.
- Think through your event, step-by-step, from the leadership’s arrival and getting your area set up and/or decorated, each item on the event schedule, and clean up/tear down; now - be sure to bring all items you will need to carry out each part of the retreat. Such items might include extension cords, power strips, decorations (table cloths, centerpieces), office supplies (pens, paper, tape, trash bags, poster board, scissors, etc.), equipment needed for activities, etc.

### *What we need from you and when...*

We need the following information provided to us no later than the times listed below, prior to your event date:

- Area Usage (rooms, outdoor areas)      1 month      \_\_\_\_\_
- Any programming scheduled with Heartland      1 month      \_\_\_\_\_
- Set up information      14 days      \_\_\_\_\_
- Final count of registrants      14 days      \_\_\_\_\_
- Your “Schedule of Events”      14 days      \_\_\_\_\_

Considering all this information ahead of time will help you plan more efficiently, communicate most effectively with the Heartland team and your participants, and ensure a smooth-running event.

We look forward to working with you as you plan your event. If you ever have any questions, please do not hesitate to call Heartland, Guest Services, we will be glad to help you!

# ***Frequently Asked Questions on Contracting***

## ***What is a day Guest?***

A day guest is a person with your group that does not stay overnight, but comes on the grounds to participate in sessions, meals, or recreation with a retreat group. There is a per person, per day “day guest” fee.

## ***Can we grow beyond our original guest estimate?***

The amount of space reserved for your group is based on the information given at the time your contract is drawn up and anticipated attendance for the retreat. If your registration numbers are growing beyond original estimates, it is possible to increase your attendance to the capacity of the buildings and/ or rooms reserved: our other facilities may be full, and additional space may not be available.

## ***What types of linens do we need to bring?***

You must supply your own linens for the dormitories; we suggest you bring twin size sheets & a blanket or sleeping bag, pillow, towel & wash cloth. Hickory lodge private rooms are available without linens, or with linens provided for you at a small additional charge. The Beechnut Lodge supplies all bed and bath linens for our guests. (Heartland can provide linen service for bunk rooms at a per-person fee: \*\*must contact Guest Services at least one month in advance of your scheduled event.)

## ***What if we don't return the contract and deposit by the due date?***

If these are not returned by the stated date, then your retreat may be removed from our calendar. Because a retreat is not confirmed until the signed contract is returned, we use contracts to keep an accurate record of our current availability. If you have a problem returning the contract or deposit by the due date, please contact Guest Services as soon as possible to make alternate arrangements. Deposits are non-refundable.

## ***What if we need to cancel the retreat?***

If you have not signed the contract or sent a deposit, simply call Guest Services to let us know you no longer need those dates. If you have already returned the signed contract and deposit, see cancellation policy below:

- If the event is canceled for any reason after the contract is signed, the Guest Group agrees to forfeit the deposit as a cancellation fee.
- If the event is changed or canceled for any reason within 6 months-91 days of the event, the Guest Group agrees to pay 35% of the total value of the contract or the difference due to the change (if the change results in a dollar amount less than the guaranteed minimum.).
- If the event is changed or canceled for any reason within 90-31 days of the event, the Guest Group agrees to pay 50% of the total value of the contract or the difference due to the change (if the change results in a dollar amount less than the guaranteed minimum).
- If the event is changed or canceled within 30 days of the event date, the Guest Group agrees to pay 100% of the total value of the contract or the difference due to the change (if the change results in a dollar amount less than the guaranteed minimum).

## ***What if we don't meet the guaranteed minimum of persons, as listed on our contract?***

If your actual attendance falls below your “guaranteed minimum attendance”, you will still be required to meet your entire financial obligation for the guaranteed minimum dollar amount.

## ***What does it mean when HCRC refers to a “final meal count”?***

A final meal count refers to the final number of people submitted to HCRC for food ordering/preparation purposes, usually 14 days in advance of the retreat. If this number is less than the guaranteed minimum as stated on your User Agreement, you are still obligated to pay the full dollar amount stated in the agreement. If the final number called in exceeds the guaranteed minimum originally established, the higher figure will be the minimum number of meals that will be charged to the group. (This means that if persons do not show up to the event, your group is still obligated to pay for the food purchased and prepared for them.)

**If you still have questions about the contract or items contained therein,** contact Guest Services to discuss any concerns before signing the agreement.

## SAMPLE ROOM SET-UP



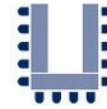
### HOLLOW SQUARE

Use for large board meetings, roundtable discussions. Does not work well for larger groups.



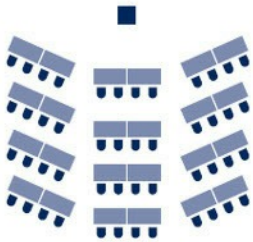
### CONFERENCE

Use for small board meetings, roundtable discussions. Does not work well for larger groups.



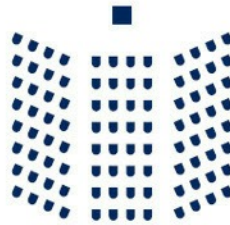
### U-SHAPE

Use for board meetings, roundtable discussions where an AV presentation is also incorporated into a meeting. Does not work well for larger groups.



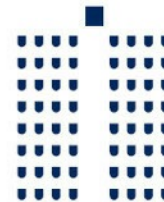
### HERRINGBONE CLASSROOM

Use when attendees will be in an extended session or need to refer to materials, take notes, etc.



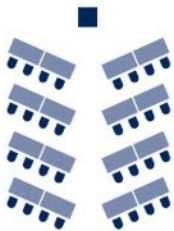
### HERRINGBONE THEATER

Use when you need to maximize seating for a room or if attendees are required only to listen to presentation without needing to take notes, etc.



### STRAIGHT THEATER

Use when you need to maximize seating for a room or if attendees are required only to listen to presentation without needing to take notes, etc.



### CHEVRON CLASSROOM

Use when attendees will be in an extended session or need to refer to materials, take notes, etc.



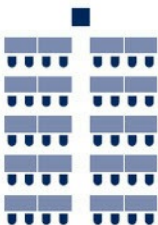
### CHEVRON THEATER

Use when you need to maximize seating for a room or if attendees are required only to listen to presentation without needing to take notes, etc.



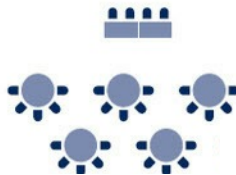
### SUNBURST

Ideal for classroom-style presentation where you also want groups to have roundtable discussions.



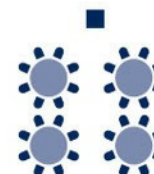
### STRAIGHT CLASSROOM

Use when attendees will be in an extended session or need to refer to materials, take notes, etc.



### CRESCENT ROUNDS (Hickory Lodge only - max 10 tables)

Ideal for classroom-style presentation where you also want groups to have roundtable discussions.



### ROUNDS (Hickory Lodge only - max 10 tables)

Ideal for dinners, social events or meetings that may have a working lunch, continental breakfast or roundtable discussion.

**HEARTLAND CONFERENCE RETREAT CENTER**  
**Activities & Program**  
**Participation Agreement**

\_\_\_\_\_  
Print Participant Name

\_\_\_\_\_  
Print Name of Group

\_\_\_\_\_  
Date of Event

**INSTRUCTIONS: Please read this entire form carefully. Each participant and/or their custodial parent/guardian must read, complete, sign and submit this agreement to Heartland so that Heartland receives all completed and signed forms at least one business day before the Event Date. Without an appropriately signed form delivered to Heartland in advance, the individual will not be permitted to participate in the Program.**

I have read, and do understand, the Participation Is Voluntary statement accompanying this form. I understand that my/my child's participation in all activities offered by Heartland Conference Retreat Center (Heartland) is based on the Participation Is Voluntary philosophy. These activities include, but are not limited to: High Ropes, Zip Line, Team Challenge, Group Problem Solving, Archery, Night Hike, Nature Center, Large Group Game, Orienteering, Campfire, Living History, Wagon Ride, Bird Blind, Climbing Wall and Wilderness Rush. I recognize that the Heartland Activities are designed to utilize experiential and engaging teaching techniques, and that my participation is purely voluntary. At all times I will choose my level of participation in any activity, and I agree to follow all guidelines and instructions as presented.

I do understand that the staff of Heartland have received extensive training, and will work to protect the emotional and physical safety of myself/my child. I understand that participation in Heartland activity in which I/my child have enrolled, may entail certain risks. I elect to participate in spite of these risks.

I do understand that safe participation in Heartland Activities requires reasonably good health, and I certify that I have/my child has no medical, emotional and/or physical conditions which could interfere with my/my child's safety in this activity/these activities.

I grant to Heartland and all persons acting through them, the rights to use, reproduce, assign, and/or distribute photographs, films, videotapes, and sound recordings of myself/my child for use in materials they may create.

I have read and do understand and accept the terms and conditions stated herein and acknowledge that this agreement shall be effective and binding upon my heirs, assigns, personal representatives and estate and for all members of my family, including minor children.

**Therefore, for myself/my child, I knowingly and voluntarily assume all risks involved in my/my child's participation, and do hereby release and promise to defend, indemnify, and hold harmless, Heartland and its members, trustees, officers, employees, volunteers, independent contractors, and agents from any and all liability, damages, costs and expenses arising out of or relating to bodily or psychological injury, or loss that may occur as a result of participation in Heartland Activities, whether such injury arises out of the negligence of Heartland, myself/my child, or otherwise.**

\_\_\_\_\_  
Signature of Participant **(Required)**

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Custodial Parent/Guardian  
**(Required if participant is a minor)**

Age of Participant if a minor: \_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone





**HEARTLAND**

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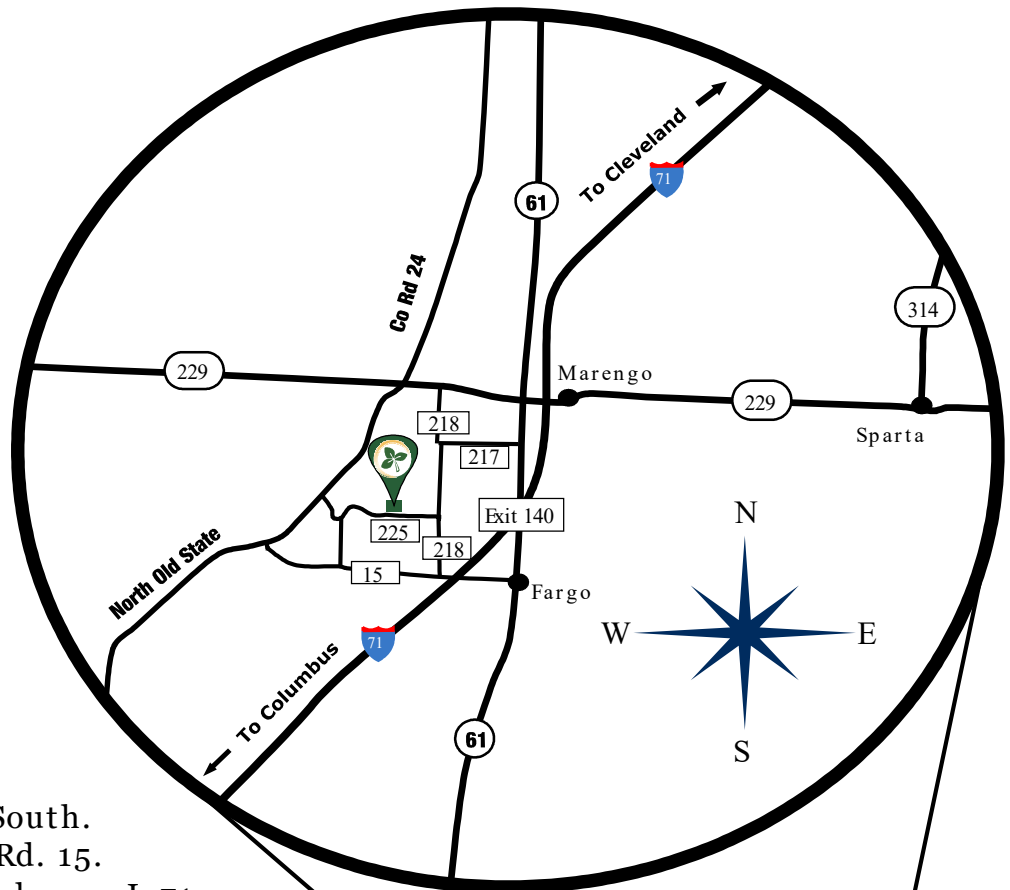


Legend	
	Trails
	Road
	Sidewalk
	Picnic Area
	Campfire Pit
	Property Line
	Distance (miles)
	Beechnut .3
	Big Oak .5
	Blue Stem .9
	Bunker Run .8
	Fawn Hollow .7
	Rocky Run .5
	Shale Ridge .6
	Timber Hollow .2
	Whitetail .7
	Wild Flower Loop .3



# HEARTLAND

## Driving Directions



### From I-71

Take Exit 140, St. Rt. 61 South.  
Turn right (west) on Co. Rd. 15.  
County Road 15 will go back over I-71.  
Turn right (north) on County Road 218. Turn  
left (west) on County Road 225. The entrance  
to Heartland is on the right.

### From Route 23

Turn east on St. Rt. 229 and continue through  
the town of Ashley. Turn right (south) on Co. Rd.  
24, then left (east) on Co. Rd. 225.\* The  
entrance to Heartland is on the left.

**\* IMPORTANT: BUSES AND RVs CANNOT USE Co. Rd. 24 to Co. Rd. 225 DUE TO LOAD LIMITS.** For Buses and RVs: Instead of turning right (south) on Co. Rd. 24, continue to Co. Rd. 218 and then turn right (south). You will come to a sharp left curve. After the curve, turn right to stay on Co. Rd. 218. Go 1 mile and turn right (west) on Co. Rd. 225. The entrance to Heartland is on the right.

