**Retreat Interview Checklist**

Chapter:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Retreat:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

President:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ P-E:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dates:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Location:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Times:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Airport:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **X** | **Component** | **Notes** |
|  | Welcome |  |
|  | Icebreaker (s) |  |
|  | Chapter/HQ Updates – Metrics/CBM |  |
|  | Administrator/Manager Presentation |  |
|  | Business Plan |  |
|  | Budget |  |
|  | Education Calendar Review (24 month) |  |
|  | Brainstorming |  |
|  | Department Speed Dating |  |
|  | Teambuilding – Board Challenges? |  |
|  | Succession Planning |  |
|  | Volunteer Assessment & Plan |  |
|  | Nominations |  |
|  | Transition Plan |  |
|  | Needs Assessment/Survey Results Review |  |
|  | Roadmaps/Playbooks |  |
|  | Timeline Conception to Completion |  |
|  | Fitness/Mindfulness |  |
|  | Management Tool Review i.e. Base Camp, Google Drive |  |
|  | Pricing Strategy |  |
|  | Reserve Reinvestment Plan |  |
|  | Value Proposition Creation |  |
|  | Demographic Report Review |  |
|  | RISE Up Programs |  |
|  | Young Professionals Plan |  |
|  | Experiential Events |  |
|  | Conflict Management |  |
|  | Communication Skills |  |
|  | Directors vs. Doers |  |
|  | Discussions |  |
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| **X** | **Documents Needed** | **Notes** |
|  | Current Dashboard |  |
|  | Business Plan |  |
|  | Major Events |  |
|  | Board List/Positions/Slate |  |
|  | 24 Month Calendar |  |
|  | Budget vs. Actual to Date |  |
|  | Other |  |
|  | Other |  |
|  | | |