**Retreat Interview Checklist**

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

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

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

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

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| **X** | **Component** | **Notes** |
|  | 3 Successes/Challenges – An Overall Board Perspective |  |
|  | Welcome |  |
|  | Icebreaker (s) |  |
|  | 5 Year Visioning Exercise |  |
|  | Chapter/HQ Updates – Metrics/CBM |  |
|  | Administrator/Manager Presentation |  |
|  | Business Plan/Presentation Model |  |
|  | Budget |  |
|  | Brainstorming – Rotate Flip Charts |  |
|  | Affinity Grouping – Brainstorming/Solution Solving |  |
|  | Teambuilding – Board Challenges? |  |
|  | Succession Planning Culture  Volunteer Recruitment, Development, Management, |  |
|  | Nominations |  |
|  | Succession Planning - Chart |  |
|  | Education Calendar Review (18 month) |  |
|  | Soluntion Circle |  |
|  | Org. Chart Development |  |
|  | Needs Assessment Analysis |  |
|  | Board Self Assessment |  |
|  | Board Meeting |  |
|  | | |

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| **X** | **Documents Needed** | **Notes** |
|  | Current Dashboard |  |
|  | Business Plan |  |
|  | Major Events |  |
|  | Board List/Positions/Slate |  |
|  | Departments to Present |  |
|  | Calendar |  |
|  | Budget vs. Actual to Date |  |
|  | Other |  |
|  | Other |  |
|  | | |