

## **Section II – RMR Region Retreat General Information and Organization**

### **A. Region Retreat Policies – Found in Section I of the Region Retreat Guidelines**

### **B. Retreat Job Descriptions – Job Descriptions are RMR policy and full descriptions are found in Section I of the Region Retreat Guidelines**

### **C. General Information**

1. Any questions regarding Rocky Mountain Region retreats should be directed to the assistant region director.
2. An up-to-date roster, including all contact information, of all retreat committee chairmen should be sent to the assistant region director and the region director. Updates should be sent whenever there is a change.
3. Meetings of the retreat committee should be scheduled as necessary and are conducted via email and/or phone conference calls.
4. The retreat chairman shall provide adequate space for the region business meetings and other official functions that take place at retreat. This list can include the region & executive board meetings, space for exhibits, and fund-raising activities.
5. A retreat theme may be selected.
6. Creating a retreat logo is at the discretion of the retreat committee. There can be an expense involved depending on if the committee uses a graphic artist or not. The logo will need to be in formats to support use on documents and the RMR website. Retreat logos must include the EGA trademark. The EGA trademark (logo) is defined as the EGA emblem, the words “The Embroiderers’ Guild of America”, or the letters “EGA”. The retreat logo must be submitted to the EGA Product Design and Sales Committee for approval prior to being used. Note: This process should take place at least one year before the retreat – earlier is better.

### **D. Retreat Exhibits**

1. The Prospectors chairman is in charge of the exhibits at retreat.
2. At each retreat there is a Prospectors Exhibit and possibly, an exhibit of the classes for the next seminar.
3. An exhibit of the work by members of a local chapter, an exhibit by region members, or a specialty exhibit may also be scheduled.
4. Work within the budget provided by the retreat committee, making timely reports to the retreat chairman.
5. Work with retreat chairman, arranging for space, necessary flats and tables. RMR has a supply of table and floor easels included with the Electrical Suitcase(s) and Inventory.
6. Follow exhibit guidelines and protocols as laid out in *Prospectors Exhibit Guidelines* (Section V-Misc, RMR Officers’ Notebook)
7. File exhibit insurance forms with EGA headquarters. (Go to national website for current insurance form). NOTE: Check submittal time constraints.
8. Prepare necessary layout diagrams prior to hanging the exhibit.
9. See that identification cards are properly prepared for each exhibit item. Identification cards for the classes for the next seminar and any special exhibits may be prepared by the respective chairmen. Verify who is doing them.
10. Retreat registrar will supply a list of volunteers who will be attending retreat.

## **E. Suggested Timeline for Retreat Preparation**

**No later than the annual RMR mtg 2 years prior to year of retreat.**

- Retreat chairman appointed by region director & approved by executive board.
- Retreat committee members selected by retreat chairman (30 days after retreat chairman appointment) & approved by executive board.

### **24 Months**

- Site selected.
- Retreat theme and logo selected; logo approved.
- Initial workplan/budget presented and approved.
- 1st loan requested.
- Mentors sought.
- Retreat city, state and site announced to region.

### **20 Months**

- Mentors chosen and contracts signed.

### **15 Months**

- Registration information ready for email, print and website.
- Hotel information ready for email, print and website.
- Travel/City information ready for email, print and website.
- Display items and printed registration packets ready for early registration to open.
- Invitation ready to hand out at closing banquet of seminar.

### **12-13 Months**

- Early registration opens at seminar (for 2 months).
- Retreat goes live on website.
- 2nd loan request.

### **9-10 Months**

- Early registration closes.
- Early registration studios assigned; registrants informed.
- Regular registration opens (day after early registration closes).

### **4 Months**

- Regular registration closes.
- Decide studios not meeting minimum enrollment & make decision about cancellation.
- Reassign early registrants if a studio is cancelled; registrants informed.
- Regular registration studios assigned; registrants informed.
- Late registration opens (day after regular registration closes).
- Food issues survey taken.

### **3 Months**

- Late registration closes.
- Late registration studios assigned; registrants informed.
- Lists of studio registrants sent to mentors.
- Angels assigned.
- Remaining billing (e.g. extra banquet tickets, facilities use fee) sent out.

## **2 Months**

- Banquet entrée choices are sent out.
- Billings are due.
- Banquet entrée choices are due.
- Refunds minus \$50 fee up to 2 months before opening date.

## **1 Month**

- Handbooks are emailed; printed and mailed to those without email.
- (Minimum) Audit committee is selected by retreat chairman and ratified by region executive board.

## **RETREAT WEEK**

### **Following retreat:**

- All financial records turned in at retreat wrap-up meeting.

### **Within 7 weeks of close of retreat**

- Retreat registrar and mentors chairman send Final Committee Chair reports to retreat chairman.

### **Within 8 weeks of close of retreat**

- All relevant financial records are with the audit committee.

### **Within 10 weeks of close of retreat**

- Audit of financial records is complete.

### **Within 12 weeks of close of retreat**

- Region treasurer sends Final Financial Report (including audit report) to retreat chairman.

### **Within 13 weeks of close of retreat**

- Region Treasurer sends Final Retreat Financial Report to retreat chairman.
- Retreat chairman sends complete Final Retreat report, including Final Retreat Financial report, and Retreat Summary report to region director, assistant region director, and upcoming seminar and retreat chair(s).

### **Within 14 weeks of close of retreat**

- Registrar shreds all paperwork from files of retreat attendees.

## **F. Retreat Food Functions Guidelines**

1. Works closely with site food service manager to plan all food functions.
2. Determines the number of attendees (participants, faculty, and guests) at region lunch and banquet.
3. Reviews and selects menus within price range estimated by the retreat budget for retreat banquet and region budget for region lunch.
4. Determines, with site food service manager and region director, the best situation for the region lunch – plated, boxed, buffet – and location where lunch will be served.
5. Ensures that site food services can accommodate those with special dietary needs, within reason.
6. Works with retreat registrar to survey registrants on special dietary needs for banquet.
7. Presents recommended menus for region lunch to region director for final selection
8. Presents recommended menus for banquet to retreat committee for final selection.
9. Works with retreat registrar to have tickets printed for banquet. Note: Check with site contact on this. Site may wish you to use their own tickets.
10. Works with site food service manager to determine how tickets will be collected at banquet.
11. Plans for any pre-banquet reception, including cash bar.
12. Verifies deadline date with food services manager for notification of meal counts.

### **Menus**

1. Select menus that have an appeal to a broad variety of people.
2. Select several menus to present to the retreat committee for the banquet and the region director for the region lunch.
3. Food items such as fish/shellfish are usually not included in a banquet as they are an allergy problem and are expensive.
4. Plan the banquet menu to accommodate, within reason, those who have food allergies or other food issues such as gluten-free, lactose intolerance.
5. Plan a vegetarian alternative for the banquet, making sure it is an appealing and creative dinner choice. Because extra banquet tickets have a price on them, someone does not want to “pay” that price for a plate of plain, steamed vegetables.
6. Create tent cards or other form of identification for any “special” food needs that are being accommodated for individuals.

### **Meal Tickets**

1. Meal tickets are provided in the registration packet.
2. When there is more than one choice of entrée, registrants will be contacted by registrar ahead of time with the choices. Registrants will respond with their choice (and that of any guest).
3. It is recommended that tickets of different colors be created to identify the menu choices for the attendees. Example: Yellow tickets for main entrée, green tickets for vegetarian entrée. Be sure to check first with the site food service manager to ensure this method is acceptable to them.

## Retreat Committee Chairman Final Report Form

Complete this form and email to the retreat chairman per job description guidelines. If there was any printed matter associated with your job (receipts, contracts, etc) that is not in an electronic format, please scan and include with your report, unless otherwise indicated through your Job Description. Also, add any suggestions for future retreats, as well as what your job entailed including any duties performed that are not on the Job Description, and how you handled it.

Retreat Assignment:

Name:

Job Description: Outline responsibilities if different from those contained under your Job Description in the RMR Retreat Guidelines.

Expenses:

Procedure followed: (Include timeline and man hours involved)

Recommendations to improve or make the job easier:

## **Retreat Chairman Final Report Form**

Prepare an overview report of the retreat based on your view of every activity or committee duty, plus your responsibilities. Include any responsibilities you had, if different from those contained in your RMR Retreat Guidelines Job Description. This report, including complete financial report, is due to the region director, assistant region director and upcoming retreat chairman within 13 weeks of the close of retreat. The report will be sent via email.

Expenses:

Procedure followed:

Recommendations:

**Retreat 20xx Summary Report (Page 1)**

This is to be filled out by the retreat chairman after the retreat. A copy is to be sent to the region director, the assistant region director, and the upcoming seminar and retreat chairmen within 13 weeks of the close of retreat.

Dates of Retreat: \_\_\_\_\_ to \_\_\_\_\_

City and State: \_\_\_\_\_

Name of Retreat: \_\_\_\_\_

Name of Chairman: \_\_\_\_\_

Name of Site (i.e. hotel, college): \_\_\_\_\_

Address \_\_\_\_\_

Phone number \_\_\_\_\_ FAX number \_\_\_\_\_

Name of Site Contact Person: \_\_\_\_\_

Non-refundable Fee charged: \$ \_\_\_\_\_

Registration Fee Charged: \$ \_\_\_\_\_ (minus non-refundable fee; includes 1 banquet)

Hotel/Venue Room Rate per Night: \_\_\_\_\_ Double occupancy? \_\_\_\_\_ Include breakfast? \_\_\_\_\_

Number of Early registrants: \_\_\_\_\_ Number of Regular registrants: \_\_\_\_\_

Number of Late registrants: \_\_\_\_\_ Number of cancellations: Early \_\_\_\_\_ Regular \_\_\_\_\_

Total Number of Attendees: \_\_\_\_\_

Number of Hotel Nights Used:

Pre-event \_\_\_\_\_ Night before opening day \_\_\_\_\_ Night of opening day \_\_\_\_\_

Night of last day \_\_\_\_\_ Post-event \_\_\_\_\_

Food and Beverage Contractual Obligation \$ \_\_\_\_\_ Actual Amount: \$ \_\_\_\_\_

Room Rental Contractual Obligation \$ \_\_\_\_\_ How many meeting/studio rooms used: \_\_\_\_\_

Arrival and Departure Patterns (i.e. air, car, early, etc.): \_\_\_\_\_

List Exhibits (not including Prospectors): \_\_\_\_\_

Mentor Fee paid (flat amount per mentor): \$ \_\_\_\_\_

List Mentors, Technique, & the number of students in the studio **OR** if it was cancelled:

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Open Stitching \_\_\_\_\_

**Retreat 20xx Summary Report (page 2)**

Number of volunteer hours (estimate) put in by everyone: \_\_\_\_\_

Amount and types of items donated and from whom (i.e. goods for door prizes, favors, etc.):

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