

CHECKLIST FOR PLANNING A SUCCESSFUL AND IMPACTFUL DIVERSITY RETREAT

- ☐ Ask for feedback (and review) from participants at recent retreats to gauge requested speakers and content.
- ☐ Consider holding the retreat somewhere that isn't the office, so people can actually retreat and aren't inclined to work as much as they would if they were in the office.
- ☐ Make sure that portions of the retreat are hybrid, for those who can't attend in person. We learned during the pandemic that this sort of inclusion was possible, and offering it gives people an opportunity to feel connected, even if they're unable to attend the retreat in person
- ☐ Ask in-person participants if they have any additional wellness needs, such as a quiet room or lactation room.
- ☐ Especially now that we are in a hybrid world, be clear about the intended dress code. Define business casual. Remember you're bringing in people from different regions. You don't want people to feel like outsiders because they're over or under dressed.
- ☐ Ensure that the content features both speakers who talk about relevant skills and best practices as well as practitioners who've actually implemented those skills.
- ☐ Invite other stakeholders: firm leaders, alumni, current clients, etc., to come and talk about their experiences. This provides participants with a broader perspective of what is possible, whether they want to stay and pursue leadership or leave and become an alumni (and perhaps a client?)
- ☐ Incorporate icebreakers, either at the tables, or as activities led by facilitators, to help encourage connection amongst participants.
- ☐ Use all meals strategically. Assign stakeholders and firm leaders to sit at designated tables at lunch and dinner or encourage them to do round robins to connect with as many people as possible.
- ☐ Don't over plan! Allow space in the agenda for networking and allowing people to connect organically. Don't pack in too much, agenda-wise. Often organizations forget this and try to cram in full schedules.
- ☐ Carve out space for affinity groups to meet on their own.
- ☐ Don't forget to incorporate fun into the retreat agenda—this helps participants decompress, build rapport, and connect.
- ☐ Engage a photographer to cover the retreat activities so you can share the pictures (pay particular attention to the group photos), but also to have documentation for your diversity report.
- ☐ Share on social media that the retreat took place! Hype it up and encourage others to share their takeaways. Most clients want to see that you're committed to diversity, so sharing that you had a diversity retreat can be good business development that also supports marketing, recruiting, and retention efforts.

If you are looking for a speaker to talk about professional development topics through the lens of diversity, equity, and inclusion and/or need support developing your diversity retreat, please contact me at info@paulaedgar.com. I would love to collaborate with you for your next retreat!