

Bar Association Planning Retreat Sample Timeline

Week One	Planning Retreat/Date Confirmed
Week Two	Conference Call with Executive Director and Officers (Call arranged by DBS) <ol style="list-style-type: none">1. Introductions2. Expectations3. Review of the Process<ul style="list-style-type: none">• What information do we need in order to have an informed discussion?• From whom do we need to obtain feedback?*
Week Four	Requested background materials to DBS facilitator (e.g., board minutes from the past year, any prior planning documents, an inventory of bar programs and services and a roster of retreat participants (name, title, address, phone, fax and e-mail address))
Week Five	Survey Distributed to Retreat Participants
Week Seven	Survey Response Deadline
Week Nine	Conference Call with Executive Director & Officers to discuss survey responses and develop agenda (Call arranged by DBS)
Week Ten	Planning Session
Week Fourteen	Report Submitted

*The facilitator will survey the bar's governing body and/or retreat participants. Should the bar association want to conduct a membership survey, it should allow an additional month to six weeks for the creation of the survey, and the compilation and analysis of the results. Depending upon their scope, membership surveys are an additional charge of \$300-\$750.