**OFFSITE PLANNING GUIDE TEMPLATE**

# **Introduction**

## **Purpose of This Guide**

This guide serves as a framework to help HR professionals and event organizers plan effective and engaging offsite events. Use this template to customize your own guide with organization-specific details.

## **Key Contacts**

For questions regarding this guide, please contact:

* [Name & Email of Primary Contact]
* [Additional Contacts]

# **Offsite Event Overview**

## **Why Host an Offsite Event?**

Define the purpose of your offsite event. Examples include:

* Team bonding
* Strategic planning
* Learning & development
* Celebrating milestones

## **Key Planning Considerations**

* What are the goals of this event?
* Who will be attending?
* What is the preferred location?
* What is the estimated budget?
* What activities will be included?

# **Venue & Logistics**

## **Site Capacity & Locations**

Provide a list of potential locations for offsite events, including:

* Address
* Contact information
* Capacity details
* Available facilities

## **Accommodation Options**

Provide a table with different accommodation options to help managers quickly choose a suitable stay:

| **Hotel Name** | **Address** | **Drive Time to Venue** | **Price Range** | **Amenities** | **Contact Info** |
| --- | --- | --- | --- | --- | --- |
| [Hotel A] | [Address] | [Time] | [$-$$$] | [WiFi, Breakfast, Gym, etc.] | [Phone/Email] |
| [Hotel B] | [Address] | [Time] | [$-$$$] | [WiFi, Breakfast, Gym, etc.] | [Phone/Email] |
| [Hotel C] | [Address] | [Time] | [$-$$$] | [WiFi, Breakfast, Gym, etc.] | [Phone/Email] |

## **Who to Contact for Challenges**

If managers run into issues with payment, planning, or contracts, they should reach out to:

* **Finance Team**: [Contact Name & Email] – for budget approvals and reimbursements
* **Event Planning Team**: [Contact Name & Email] – for logistical support
* **Legal/Contracts Team**: [Contact Name & Email] – for contract-related inquiries

## **Expense & Reimbursement Policy**

Define the policies for:

* Travel expenses (e.g., flights, mileage, rental cars)
* Hotel accommodations (approved vendors, reimbursement limits)
* Food & beverage (per diem, allowable expenses)
* Other reimbursable expenses (e.g., venue rentals, team-building activities)

### **Budget-Friendly Planning Tips**

* **Book early** – Flights, hotels, and vendors offer discounts for early reservations.
* **Flexible scheduling** – Off-peak times can reduce hotel and venue costs.
* **Encourage shared transportation** – Carpooling fosters camaraderie and minimizes costs.
* **Use preferred vendors** – Secure discounts through company-preferred providers.

# **Event Planning Timeline**

### **3+ Months Before**

* Define event objectives
* Secure venue
* Set budget
* Outline agenda

### **2 Months Before**

* Finalize team-building activities
* Confirm guest speakers (if any)
* Arrange logistics (transportation, lodging)

### **1 Month Before**

* Send out invitations
* Gather RSVPs
* Finalize catering & entertainment

### **1 Week Before**

* Conduct final run-through
* Confirm all reservations
* Communicate last-minute details with attendees

## **Structuring the Agenda**

A well-balanced agenda maintains engagement and ensures productivity. Consider:

### **Sample One-Day Offsite Agenda:**

| **Time** | **Activity** |
| --- | --- |
| 9:00 AM | Arrival & Welcome Breakfast |
| 10:00 AM | Icebreaker Activity |
| 10:30 AM | Business Strategy Discussion |
| 12:00 PM | Lunch Break |
| 1:00 PM | Teambuilding Workshop |
| 3:00 PM | Break |
| 3:30 PM | Working Session or Skillbuilding Workshop |
| 5:00 PM | Wrap-Up & Closing Remarks |
| 6:00 PM | Optional Dinner/Networking |

*Pro Tip:* Leave room for informal interactions. Casual discussions often lead to valuable insights and stronger connections.

# **Team-Building Activities**

## **Assessment Tools**

| Tool Name | Description | Cost | Link |
| --- | --- | --- | --- |
| Myers-Briggs Type Indicator (MBTI) | Personality assessment for team dynamics | Free/Paid | [Link] |
| CliftonStrengths | Identifies individual strengths | Free/Paid | [Link] |
| How I Work Guide | Helps employees communicate their work style | Free | [Link] |

## **Interactive Group Activities**

| Activity Name | Description | Items Needed |
| --- | --- | --- |
| Common Ground Bingo | Icebreaker to find commonalities | Bingo cards, pens |
| Balloon Stomp | Competitive game involving popping balloons | Balloons, string |
| Blindfolded Obstacle Course | Builds trust and communication | Blindfolds, obstacles |

## **Local Activities & Entertainment**

| Activity | Location | Approx. Cost | Details |
| --- | --- | --- | --- |
| Bowling Alley | [Address] | [$-$$$] | Lanes, arcade games |
| Escape Room | [Address] | [$-$$$] | Team challenge experience |
| Mini-Golf | [Address] | [$-$$$] | Outdoor/indoor courses |
| Virtual Reality Arcade | [Address] | [$-$$$] | Group VR experiences |

# **Post-Event Follow-Up**

## **Evaluating Success**

Conducting surveys before and after the offsite helps gauge its impact on team dynamics, engagement, and alignment with business goals.

### **Pre-Offsite Survey**

The pre-event survey identifies expectations, concerns, and focus areas. Key questions include:

1. What are your main goals for this offsite?
2. How connected do you currently feel to your team (1-5 scale)?
3. What topics or discussions would you find most valuable?
4. What challenges do you face in collaboration or alignment with your team?
5. Are there any personal development areas you'd like to focus on?

### **Post-Offsite Survey**

The post-event survey measures whether the offsite met expectations and improved team cohesion. Key questions include:

1. How well did the offsite meet your expectations?
2. How connected do you feel to your team now (1-5 scale)?
3. What was the most valuable part of the offsite?
4. What could be improved for future offsites?
5. Did the offsite provide clarity on company goals and next steps?

### **Survey Analysis & Next Steps**

Compare pre- and post-offsite responses to assess impact. Look for improvements in team alignment, collaboration, and morale. Use feedback to refine future events, ensuring they continue to drive meaningful outcomes.

## **Documentation & Reporting**

* Summarize key takeaways
* Share post-event insights with leadership
* Archive for future reference

A well-planned offsite can be a transformative experience for teams. By setting clear objectives, budgeting effectively, choosing the right venue, and engaging employees with meaningful activities, your organization can maximize the impact of every offsite event. Use this guide as a repeatable framework to make each offsite better than the last!