AMERICAN COLLEGE OF TRIAL LAWYERS

Guide to

Hosting a State or Province Retreat

October 2026

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Introduction

A Fellows Retreat provides an opportunity for Fellows within a State or Province to strengthen relationships with the Fellows in their Chapter.

A Fellows Retreat differs from a Regional Meeting in two primary ways. First, a retreat is generally intended for Fellows within a particular State or Province. Where appropriate, a retreat may include Fellows from neighboring chapters. A Regional Meeting typically brings together Fellows and their spouses or guests from all States and Provinces within a region.

Second, the focus of a retreat is generally on Fellowship, collegiality, and social activities. While a retreat may include speakers or other substantive programming, these are generally secondary to the opportunities for Fellows to connect and spend time together. Regional Meetings typically include a General Session and a more substantial program featuring speakers and/or professional development, in addition to social activities.

This guide outlines recommended steps for a State or Province (S/P) Committee when planning a Fellows Retreat. Although each retreat will reflect the interests and needs of the particular Fellows in that State or Province, this guide was created to help the S/P Committee organize an event that encourages meaningful connections and reinforces the sense of Fellowship that distinguishes the College.

Initial Decisions

Determine interest in a retreat and estimate level of participation

It is imperative to canvas the Fellows in your State or Province to determine whether they are interested in, and willing to commit to, attending a retreat. Most College functions like this include spouses, but you may also want to confirm that *your* Fellows *want* spouses to attend, and more importantly how many will bring their spouses.[1] In order to budget for a retreat, you will need to estimate how many Fellows and spouses might attend, so getting this information is a crucial first step. You can survey your Fellows with a simple email, or by using a survey platform like Survey Monkey. Staff at the National Office have experience with such surveys and may be able to help.[2]

Planning committee

This is not a one-person job. While you will need a chair to lead the effort, the committee should work together to brainstorm ideas and delegate tasks. Ideally, one or more committee members should live in the city where the event will be held. Their knowledge of local activities and restaurants, as well as connections to potential speakers who would not need to travel, can be invaluable.

Date, length, and venue

When picking the date, it is important to consider other College events. Once you have identified your preferred time of year, contact the National Office to determine what other College events are scheduled during that time to avoid conflicts. There is an understanding between the College and ABOTA, IATL, and ISOB that we will try to avoid scheduling overlapping events if at all possible. You should also avoid events that conflict with Fellows' personal calendars, such as holidays, graduation dates, or important local events such as college football games. Part of selecting the date(s) includes determining the length of the

[1] For states that have hosted retreats, like Texas, typically 2/3 of the Fellows bring their spouses.
[2] Provide ample lead time for the National Office to provide survey assistance

retreat. States that have hosted retreats in the past usually schedule arrival on Friday evening and departure Sunday morning.

Each chapter probably has a limited number of cities or towns that have both appropriate facilities and activities or attractions Fellows might enjoy. As part of your survey, you might ask where your Fellows would like to meet.

Once you have picked the location, select a hotel or resort that has the appropriate space for meeting rooms and includes facilities you may want, such as a golf course. Early selection is key; a year in advance is recommended to ensure your selected dates are available.

Role of National Office

Getting bids and negotiating contracts

Please refer to *Guide to Organizing a Regional Meeting* for detailed information.

Financial support

The hotel or resort will typically want a form of payment to secure the contract. Executive Director Dennis Maggi will need to be involved in that decision, and you should talk to him about whether such payments can be handled by the chapter's bank account.

Marketing and registration

A save-the-date notice should be sent 6-7 months before the event and you should plan to open registration far enough in advance to collect the necessary funds for the first down payment called for in your venue's contract. Typically, that down payment is due 3-4 months before the event; we recommend you start registration at least a month before that payment is due. It is strongly recommended that registration be handled through the National Office. The Meetings Department can help with save-the-date and similar emails to the Fellows in your chapter. The Meetings Department will also provide you with printed name badges for Fellows and their guests.

Venue Contracts

Unless you have an established history of holding a retreat at the same location every year, work with the National Office Meetings Department and their meeting consultant on the venue contract. If you have not previously negotiated a retreat venue contract, do not attempt to do so on your own. An experienced consultant can negotiate concessions, identify potential

issues and provide guidance if circumstances change. *Guide to Organizing a Regional Meeting* is a helpful resource as you evaluate contracts.

To get bids, you will need to identify:

- the dates you want to consider; how long the event will last, i.e., arrival day and time and departure date;
- what events you want to hold, e.g., a morning of speakers or CLE, a dinner, etc.
- how many people you expect to attend
- how many room nights you will need

Once bids are compared, the consultant will negotiate and secure a contract for you and the National Office to review, drawing on their experience to identify opportunities for concessions and potential pitfalls. You may work with the venue on event orders that determine meal and beverage options, and you may need to sign a separate A/V contract. Refer to *Guide to Organizing a Regional Meeting* for more details.

Budget and Finances

To determine registration fees for Fellows and their guests, you must prepare a budget. The National Office Meetings Department can provide an Excel template that makes it easy to prepare a preliminary budget. Make sure to factor in all food and beverage costs, A/V charges, and any other expenses identified in the contract or EOs. The template also includes "hidden" expenses such as taxes and tips. Unless your chapter is blessed with an account surplus, make sure to charge a little more than the "break even" amount in case you don't meet your quotas. Once you have filled in the blanks on the template, submit it to the National Office Meetings Department for review.

Most events like this, whether regional meetings, retreats or national meetings, charge a higher rate for the Fellow and less for the spouse. This helps serve as an incentive to invite spouses.

Food and Beverage

You will need to make preliminary decisions on food and beverage both to prepare your budget and to make sure you will meet the food and beverage minimum in your contract. The venue can provide menus with pricing for your consideration. If you are preparing your budget a year in advance, it is possible prices could change by the time of the event; ask the venue to lock in

their prices to protect against price increases. The National Office Meetings Department will assist in contract negotiation. Refer to *Guide to Organizing a Regional Meeting* for more details.

If the location permits, off-site locations for dinner can be a fun way to mix things up and allow attendees to experience the location.

If the event is more than two days long, participants may wish to have a night on their own and make their own plans. In that case, participants should be provided with a list of restaurant options.

Agenda and Speakers

Most retreats have a Saturday morning session with two or three speakers. If you want to provide CLE credit, you will need to contact your state bar association for requirements. Refer to the *Guide to Organizing a Regional Meeting* for more details.

The ACTL president may choose to attend your retreat, in which case you should provide them with time for remarks to the Fellows. This may be part of a Saturday morning meeting, or at the dinner on Saturday night.

Your State or Province Committee may also want to use the occasion to present an award. If so, please review the criteria for such awards, and the process for obtaining approval, which is set out in the *Guide to Leading a State or Province Committee*.

If desired, golf and tours are generally easy to organize, particularly with the help of local committee members.

Final word of advice: if you have never organized a retreat and would like guidance, contact the National Office Meetings Department to find out which chapters have held one recently and reach out to the person in charge of that event. Fellows are always willing to help other Fellows.