**Retreat Fund**

This fund is available to registered student groups who are in good standing with the Institute. Any student organization (House, Club, etc.) can apply to receive funding from this fund.

Your organization must apply and be approved for this funding prior to your activity. The Retreat Fund can provide *up to $1,500 per group per academic year* (while supplies last) for the purposes of a retreat, competition, or conference.

**Application and Use Guidelines**

- Apply 4 weeks in advance. The application should be submitted to the Student Financial Hub through the following online form.

  [https://caltechresidentialexperience.wufoo.com/forms/retreat-fund-form/](https://caltechresidentialexperience.wufoo.com/forms/retreat-fund-form/)

- The application for retreat funds should follow the instructions below. Student leaders must also commit to following Institute policy and the requirements placed on them by way of this funding.
- Your activity may be overnight but isn’t required to be. Retreats can take place locally or can be part of larger trip away from the Caltech campus.
- Retreats need to be registered as an event with the Office of Student Activities and Programs regardless of whether the Retreat Fund is used or whether another fund or account is used.
- No alcohol or substances allowed. If it is established that you had alcohol or any illegal substances during your activity, then your organization will not be eligible for funding from the retreat fund for the next two years.

**Retreat Definition and Requirements:**

A retreat is an opportunity to engender creativity. Retreats can be used to engage in a planning process; build a more effective team; create synergy around problems or future directions; and discuss issues at a much deeper and more thoughtful level. At Caltech we have outstanding leaders and programs, but we do not always take the time to work within our organizations to think strategically. A carefully planned retreat motivates organizations because it enlists their creative participation in setting goals and contributing to decisions. Just as important, effective retreats produce concrete approaches for tackling long-standing and difficult organizational problems.

When applying for retreat funding, it is required that student groups develop a plan and have it approved before the proposed activity. An organization should not expect that they will receive such funding automatically. The following topics should be considered and addressed in the application:

1. **Retreat Justification.** Answer the questions:
   a) ‘How does this retreat benefit Caltech and/or my organization?’
   b) ‘Why is this important to my organization?’
   c) ‘What are the activities objectives?’
2. **Facilitator** – do you need a professional facilitator or not?
3. **Attendance** – who will be attending or who should be attending?
4. **Schedule/Agenda** – when are you planning on having this activity?
5. **Location** – Is this on or off campus? Are there any special requirement needs for the chosen location?

6. **Budget**
   a) You will need to be prepared to show what the general estimated expense are for the activity (food cost, lodging, transportation, etc.).
   b) You will also need to provide a list of additional funding sources (house funding, MHF, Department sponsorship, etc.) that you are or plan to use.