



## MEETING PLANNERS GUIDE & CHECKLIST

Thank you for choosing Westerbeke Ranch for your upcoming retreat. To help ensure that your event goes smoothly and is a wonderful experience for you and your guests, we've created this guide to the key steps that need to happen prior to and during your time here. We are here to help you with these steps; please call us if you need assistance. *The documents mentioned in this guide (except for your contract) are available for download on our website at [www.thewesterbekeranch.com/resources](http://www.thewesterbekeranch.com/resources). Scroll down the web page to find the 'Booking Documents' section.*

**SPECIAL NOTE:** It is essential to confirm in advance if anyone in your group has mobility issues, is in a wheelchair, or uses a walker. Since the Ranch was constructed in the 1930's, and is located on a hillside, we have limited disabled access, especially for overnight guests.

### Upon Receipt of Contract

- Sign and return your **Reservation & Payment Contract** as soon as possible.
- **Send in your deposit(s) by the deposit due date(s).**
- Read, sign and send us a signed copy of the **Statement of Responsibility**. This document outlines your role as liaison between Westerbeke Ranch and the participants in your group.

### Three Months Before Arrival

- Collect a signed **Release & Waiver of Liability** form from each of your participants. Each person in your group is required to read, sign and return our **Release & Waiver of Liability** form to you, so that you can give us a complete set of signed waiver forms for everyone in your group upon your arrival. This form is available on our website on the resources page (link at the top of this page).
- Make sure all of your participants read the **Guidelines for Ranch Guests**, which is available on our website. It is important that you and everyone who will be part of your group reads this guide. It answers many questions and provides important information guests need to know. We find that guests enjoy their stay much more when they know what to expect before they arrive.
- Request that your insurance company (homeowners, workers' compensation or business insurance) fax or mail us a **Certificate of Insurance** listing Westerbeke Ranch as the "Additional Insured" for \$2 million. Usually these policies are only good for 12 months, so don't send this too far in advance of your event.
- If you're planning to include any music or drumming as part of your event, you, and whomever else is involved with this activity, must read and sign our **Event Music & Drumming Guidelines** form and give the signed form(s) to us.



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### Three Weeks Before Arrival—Very Important!

- **Give us a FINAL HEAD COUNT, and send us the following completed forms:**
  - Meal Arrangements
  - Room Assignments
  - Equipment Orders & Meeting Room Arrangements
- **Send us your agenda, including your break times.** This information will help us coordinate the massage schedule so that it coincides with your free time.
- **Set a time for us to do the Ranch Orientation.** This is usually done at the initial meeting and includes a brief introduction to Ranch staff, general layout of the grounds, and a review of procedures and protocol. The Ranch Orientation will take 10 to 15 minutes.

### Day of Arrival

- **Arrive at least one hour before your participants, and check in with the office.** Check your Room Assignment Sheet, which will be posted on the board in front of the Adobe and above the welcome table. Please make any rooming changes that have occurred since our last correspondence.
- Check your cabins and meeting room(s) for final changes. **NOTE: Guest rooms are not available until 4:00 PM.**

### During Your Stay

- Be sure to check in with office staff to discuss changes in plans or any needs that arise for your group. The sooner we know about issues, the sooner we can attend to them.

### Final Day

- **Re-confirm the 10:00 AM room checkout time with your participants at breakfast.** Even though most groups stay beyond 10:00 AM, we need the rooms vacated by this time to allow housekeeping enough time to clean the rooms. Your participants may leave their bags on their cabin porches or place them in their automobiles.
- **Remind your group to settle up personal charges in the office for beverage tabs, massages and store items purchased during their stay.** Allow time in your agenda for checkout. We need to individually check out each of your participants for their personal charges; please allow ample time for this. Any unpaid Honor Bar tabs will be added to your final invoice.
- Meet with office staff regarding your final invoice and payment. This usually takes 15 to 30 minutes. Final payment can be made with cash, check or credit card. As your contract states, we do not take individual payments from your participants.



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### Final Day (continued)

- This is also a good time to schedule subsequent reservations as we are usually booked well in advance.
- Please pack up your supplies, remove all papers from the walls, doors and windows and close up the meeting room(s) after all personal items are removed. As expected during your entire stay, please turn off the heat, air conditioning, fans, and lights in your meeting room(s) when not in use.
- Check with the office staff regarding lost and found items before you depart.

*Thank You!*

### Meeting Planners Checklist

- Sign and return your **Reservation & Payment Contract** \_\_\_\_\_
- **Send in your deposit** by your due date(s) \_\_\_\_\_
- Sign and return the **Statement of Responsibility** \_\_\_\_\_
- Make sure each guest reads and signs a **Release and Waiver of Liability** form and gives it to you \_\_\_\_\_
- **Inform us if anyone in your group is disabled with special needs** \_\_\_\_\_
- Make sure all your guests read the **Guidelines for Ranch Guests** \_\_\_\_\_
- Have insurance company fax, email, or mail **Certificate of Insurance** \_\_\_\_\_
- 3 Weeks Before Arrival**
- Send us your **Final Head Count** \_\_\_\_\_
- Send us your completed **Meal Arrangements** form \_\_\_\_\_
- Send us your completed **Room Assignments** form \_\_\_\_\_
- Send us your completed **Equipment Orders & Meeting Room Arrangements** form \_\_\_\_\_
- Send us your **agenda**, including your break times \_\_\_\_\_
- Let us know when you want us to do the **Ranch Orientation** \_\_\_\_\_
- Upon Arrival**
- Turn in the **complete set of signed Release and Waiver of Liability forms** for everyone in your group, including leaders \_\_\_\_\_