

ANNUAL PLANNING RETREAT

Adapted from Steve Hudson

The concept of an annual planning retreat is not new. Many pastors and church leaders schedule time on an annual basis for strategic planning. The concept of annual strategic planning is not a stand-alone process and should be the compass in your life or ministry. Strategic planning is all about vision, values, mission, and direction. It answers the question, “how will I intentionally lead my life?” Unfortunately, many people who do annual planning set a great direction, and then all of their plans get left on a computer or in a file until the next year.

The partner to annual strategic planning is a monthly personal retreat day (PRD). The monthly PRD is the clock. It is all about commitments, appointments, schedule, and progress on goals. It answers the question, “how will I manage my time?” The great disconnect for most pastors and church leaders is that they do not align the clock to the compass. A monthly PRD provides a time each month to realign, refocus, and get back to the direction that you want your life and ministry to take. It also measures progress and victory that God gives along the way.

Without a monthly PRD, an annual planning retreat can sometimes feel like Moses going up the mountain to receive a vision from the Lord for the next stage of the journey. Most of us aren’t wired to take an abrupt stop in our schedules one time a year and hope that in the span of three days God reveals the plan for the next year. If you’re not carving out time each month with a PRD to realign your clock to the compass, an annual planning retreat can sometimes be frustrating. If you do have a monthly PRD, then an annual planning retreat is the culmination of the previous eleven months of realignment, refocus, and regularly listening to God.

Elements of an Annual Planning Retreat (APR):

Worship – Use a portion of the retreat for extended time in the Word and worship. Plan ahead of the retreat to download worship songs that will direct your time. It might be helpful to find new worship for this experience and enjoy times in nature. Have your playlist ready. Also plan and prepare what sections of Scripture you will be reading. I’ve enjoyed reading through a different translation or writing chapters of Scripture or single words. Get creative and enjoy a fresh way of reading the text.

Strategic Planning – A large portion of your time is spent reviewing your Mission Aligned Priorities (MAP). This is mission critical and will require “heavy lifting”. Make sure your location allows you to focus and reflect on your MAP.

Here’s a pattern I’ve used the last 10 years:

- First day- reflect on how well I did on my goals during the past year...pray
- Middle day- wet cement goals in each MAP for the next 12 months...pray
- Last day- finalize next 12 month goals...pray

Strategic Personal Development - Plan to do key development during this time. Bring along books, articles, podcasts or videos that will help you in the following areas:

- 1_ Deeper study on the life of Christ
- 2_ Vision or strategic planning
- 3_ Ministry development and sharpening your skills to Train, Coach, Mentor
- 4_ Nurturing your Heart and personal character as a follower of Jesus
- 5_ Gospel-centered relationships (Neighbors, Family, Spouse)

Before you head out on your APR pray through what areas need attention; focus and gather the resources necessary. Plan ahead to best use your time.

Strategic Ministry Development – Use the APR to look at strategic issues that God is bringing to the forefront for the next year. Spend time thinking through areas that you want to focus on. Wrestle with these issues and pray through a strategy to implement for the next year.

For example:

- Expanding your region with model ministries
- Identifying key disciple-makers you want to strategically invest into
- Thinking about key identifiers to build movements of multiplication
- Growing and leading your team
- Developing new training resources
- Focusing on one area of your ministry
- Working on some new work disciplines and habits

Spiritual Renewal – During the APR retreat, make sure you spend time examining your heart, abiding in the unforced rhythms of grace. This may flow naturally from the worship that I mentioned earlier, but I also bring along one or two books that focus on my heart. Plan for extended times to linger, wait and listen to God. This might be in the form of taking a drive, going for a hike/walk, enjoying the thrill of a mountain bike ride or sipping a quality beverage in your hammock. Find a spot that makes your heart sing and enjoy His presence.

Ideas to help you get started on your APR

1. If you don't schedule it, it will not happen. Find a time in June - August for your APR. Make sure to have this completed before our Annual Staff Retreat in September (usually 3rd week).
2. Find a place that will be free from distractions and restful. Here are a few places to explore in your area:
 - Camps/retreat centers (many have clergy/missionary lodging for reduced rates)
 - Friend or ministry partner with vacation home or timeshare
 - Airbnb, VRBO
 - KOA, state or regional parks with cabins or yurts to rent
 - Monastery guest space (some have guest/retreat homes for individuals to use)
 - Hotels
3. I firmly believe that your annual planning retreat needs to be at least three full days. I also believe that you need to be at a location where you are not going to be interrupted by family and friends. You need to be able to change the environment and get away from distractions like your phone, email, walk-ins, etc. Three full days means traveling the day before and the day after the three full days. Otherwise, you have parts of two days filled with traveling and you only have one full day to do your planning.
4. Make a file folder and title it "Annual Planning Retreat." In fact, I have both an electronic and a hard copy file folder for APR. When you think of ideas that fit in one of the five areas of the annual planning retreat that I have listed above, throw them in your file. You will find out that over the course of the year, you start throwing articles and jotting ideas in your APR folder. About one or two months before your annual planning retreat, start gathering resources. This is where I begin compiling a list of books that I am contemplating taking with me. My pile is always bigger than what I end up taking with me, but it gives me a good menu to make my final choices of what is coming along on my annual planning retreat.
5. Plan your planning retreat. Sketch out how you will use your time. Having a plan will make your time more effective and productive. I've seen some people leave planning till the very end and then be frustrated by not getting everything done that they want to. The first day I want to go through my plans from last year and start to put things in place for next year. If I work a little bit at my strategic planning and my KRAs, goals, etc. on each of the days, it gives me time between my work to let my thoughts percolate. Then I block time for ministry strategy and spiritual renewal. Sometimes I will block half a day for each of these a couple of different times during my three days. Planning also means previewing some of the books I might want to read. There's nothing worse than planning

on reading one book and then when you get to your retreat location finding that you already read it a couple years ago and forgot that you had or that it doesn't meet your needs. I sometimes take along a couple extra books that are back-ups just in case, but usually I've done enough pre-work to know that this book is one that is going to get at the heart of where I want to go during my annual planning retreat.

6. During your annual planning retreat, do some calendar work. Besides setting the dates for your next annual planning retreat twelve months away, put in your monthly PRDs for the next year. Also, look at some of the big goals that you are writing for the next year, and do some block scheduling during your annual planning retreat where you can carve out some time to hit some of the big goals that you want to address. If they're in your calendar, you can make sure to make progress during the next year. If something else comes on your schedule during the time that you have already carved out some block time to work on big goals, you can move your block time only if there is other free space to change dates. If not, you're going to have to make tough decisions on putting off your big goals if you want to take the new appointment.
7. At the end of your annual planning retreat, clean up your MAP and goals for the next year and give them to your supervisor and a peer mentor. Ask them to hold you accountable through prayer and checking in regularly to see how you're doing. Use your monthly PRD to realign your goals each month and calendar time to accomplish what God has called you to do.

Annual Planning Retreat / Sample Agenda

1st Day

- **Worship**
 - Singing, praying, reflecting, listening
 - Review 2 prophetic prayers
- **Strategic Planning**
 - MAP – review last year's MAP and annual goals
 - Journal last year's reflections
- **Strategic Personal Development**
 - Read article/book on life of Christ
- **Strategic Ministry Development**
 - Review development from last year and journal reflections

- Strengths review- PRD folder

- Spiritual Renewal

2nd Day

- Worship

- Singing, praying, reflecting, listening
- Review 2 prophetic prayers

- Strategic Planning

- MAP – first draft for next year
- Calendar review- add PRDs for the next year
- Calendar work (Disciples, Training, Travel, Cohorts)
- Read articles in folder

- Strategic Personal Development

- Study gathered resources to sharpen your skills as a trainer/coach

- Strategic Ministry Development

- strengths review- electronic files
- Read book or articles in folder

- Spiritual Renewal

3rd Day

- Worship

- Singing, praying, reflecting, listening

- Strategic Planning

- MAP – final draft
- Schedule APR dates in calendar
- Revise personal goals for
- Review Personal Mission (revise as necessary)

- Strategic Personal Development

- Review and journal personal goals with relationships (family, friends, neighbors, etc.)

- Strategic Ministry Development

- strengths review- what needs to change

- Spiritual Renewal

Miscellaneous

Extra pens- red, and yellow highlighter

Review Self Leadership/Intentional Living electronic files

Prayer email written and sent

Pack PRD folder

Back up books

Pack journal

Post It notes