

# Sample Retreat Agenda

## Schedule

**PRE-RETREAT DINNER:** Friday, March 23 at 7:00 pm potluck dinner at home of board member.

**RETREAT:** Saturday, March 28 from 8:00 am to 4:30 pm at the Nature Center Conference Room

## Retreat Objectives

- Celebrate our accomplishments.
- Take stock of the environment in which we operate.
- Look closely at the constituents we serve, their needs and our ability to fulfill them.
- Affirm that the Mission and Values of the Organization are still highly relevant and effective.
- Create a vision for where the organization will be in 5 years.
- Assess current programs, resources, and funding in light of the vision.
- Reaffirm our commitment to XYZ Organization by strengthening our bonds as a team.

Agenda	
8:00	<b>COFFEE/TEA AND ICE BREAKER:</b> What is your dream job?
8:30	<b>SET THE STAGE:</b> Review objectives and agenda and set ground rules for the day
8:45	<b>CELEBRATING THE YEAR:</b> a quick review of highlights and accomplishments
9:00	<b>GET GROUNDED:</b> Careful review of the constituents we serve.
10:00	<b>GROUP EXERCISE:</b> SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats
10:45	Break
11:00	<b>MISSION, VISION AND VALUES REVIEW</b> – are these still relevant and effective?
11:30	<b>THE FUTURE:</b> What should we look like 5 years from now? How should we be different? The same?
12:15	Lunch break
12:45	<b>QUICK REVIEW:</b> What stands out for you from this morning's discussion?
1:00	<b>SMALL GROUP WORK:</b> Break up into two groups. Review the 5-year vision we put together before lunch. <b>Group 1:</b> Conduct a detailed assessment of our programs, in light of the vision.



	<ul style="list-style-type: none"> <li>• Create two lists to share:             <ol style="list-style-type: none"> <li>1. What should we stop doing?</li> <li>2. What should we start doing?</li> </ol> </li> </ul> <p><b>Group 2:</b> Conduct a detailed assessment of our resources and funding in light of the vision.</p> <ul style="list-style-type: none"> <li>• Create two lists to share:             <ol style="list-style-type: none"> <li>1. What are we lacking (and where should we seek it?)</li> <li>2. What can we redeploy?</li> </ol> </li> </ul>
1:45	<b>SHARE:</b> Reassemble as a group. Present, discuss, expand, and edit lists.
2:15	Write down your top 3 priorities for the organization?
2:30	Break
2:45	Go around the room and record 1, 2, or 3 next to the priorities. Which items emerge as our top priorities?
3:00	Select 3 to 5 top priorities and set goals, strategies, and action plans. Who does what and when?
4:15	Reflection and Next Steps (Does the Vision Statement need revisiting as a result of the plan?)
4:30	Adjourn

