

Annual Planning Retreat Agenda

Supplies Needed	Agenda Items
<ul style="list-style-type: none"> • A large paper calendar with all of your special annual events like birthdays, holidays, and school breaks. • A Calculator • Bank Statements • 2 Legal Pads • Pens, Pencils, etc. • Snacks <p><i>A Laptop with Microsoft Office & Outlook is a great way to Eliminate many of these supplies. It also allows you to have your meeting in places that may not have a lot of space, like a restaurant booth, the car while you are driving somewhere, etc.</i></p>	<p><i>It may be a good idea to start with a simple prayer—if it is customary.</i></p> <ol style="list-style-type: none"> 1. Annual Calendar Planning <ul style="list-style-type: none"> • Make sure you include on your calendar all of the events and appointments that are highest priority. Things like when school holidays are for children, birthdays, holidays, anniversaries for you or others, family vacations, etc. that you want to remember. This helps you plan around the most important dates when not so important dates come about as the year progresses. It also helps with the budgeting section of the meeting. 2. Annual Budget Planning <ul style="list-style-type: none"> • Start by assessing “Where the Money Went” during the last quart or so. Make sure that you have a copy of your bank statements or some way to assess what you spent on what in the past 3 or 4 months. Knowing what you currently do helps you to make adjustments based on rational and logical proof, rather than pointing blame or other things that can happen when spouses talk about financial matters. • Establish the monthly budget categories and the amounts that need to be set. Discuss these items to make sure that both of you agree about cuts or increases that need to be made. You may already have a budget that works for you. If this is the case, then you may not have to spend as much time on the budgeting section of the meeting. • Once your budget is set, apply it to each month separately. Include expenses that only occur during that month, so you know how much cushion you will have left at the end of the month—if any. • Also include budgets for the activities you want to carry out. Things like what you want to do during summer vacation, or what to do with your Tax Return are a few ideas.
<h2>Activities</h2>	
<p>If you are planning to have a retreat that is over a couple of days, make sure you have plenty of down time and activities planned to break-up the time. Here are some ideas:</p> <ol style="list-style-type: none"> 1. Go to dinner 2. Take a Walk Together 3. Take a Nap 4. Watch a Movie 5. Read a book 6. Venture to a nearby attraction like a hot spring, lake, trail, or museum. <p>The biggest thing is to plan activities you like to do together and can be done in a 1-2 hour block of time. That way you relax, enjoy the time, but also don't lose track of where you are in the meeting.</p> <p>We recommend taking such breaks in between the numbered items on the agenda.</p> <p>If you only have 1 day, make sure it is un-interrupted, kid-less, and secluded. If you choose to stay home, kick everyone out, find a baby sitter, and turn off all of your methods of communication. You can call them to check-in, but they cannot call you.</p>	<ol style="list-style-type: none"> 3. Annual and 5-year Goal Setting <ul style="list-style-type: none"> • Make sure your goals are S.M.A.R.T. SMART Stands for: Specific, Measureable, Attainable, Recorded, Timely. • Set goals in the following areas: <ul style="list-style-type: none"> • Physical—Health, Wellness, Self-Esteem, Etc. • Spiritual—These are goals that deal with your relationship with deity. • Financial—Establish good financial habits, getting out of Debt, etc. • Mental—Things like educational goals, occupational goals, challenges or changes in your mindset about something specific. • Family—Goals you have for your children individually and your family as a whole. • Home—Projects you want to do, things you want to change, etc. about your home. • Start by taking 20-30minutes to ponder what your goals are for yourself, your marriage, your family, and your children. Write them down on a legal pad and have your spouse do the same. Then share your goals with each other by taking turns. Talk about these goals and get feedback from one another. As you share them, and make decisions about which ones are going to have priority, write them down under the category heading they apply to. • After you have Set your goals, make sure that you calendar the ones that are time sensitive. For example: Let's say that you have a goal to go camping 3 times this summer with your family and no distractions, no excuses. Decide when you are going camping with your family and record it on the calendar so those dates don't get pushed aside. • Then add any necessary items to the budget during the month they are scheduled so you can make sure that funds are available for them. 4. Addressing Couple, Family and Individual Needs & Concerns <ul style="list-style-type: none"> • This is your opportunity to privately, lovingly, and openly share your genuine concerns and address the needs of your family, it's members. This is one of the only times you may have to share your concerns about your family without them present and make a plan to assist them with what is needed. • When addressing the needs of your marriage, you may want to start by asking the question, “How are we doing?” This allows your partner to think about what they want to say and how they want to say it without anyone getting defensive. Sometimes this conversation is best had when you are snuggling on a couch or sitting next to one another.