

PLANNING RETREAT GUIDE

Planning for giving allows for maximum impact. This Planning Retreat takes you through a process to look back, dream forward, and make decisions for the coming year leading to living and giving the way God intended. This retreat includes quiet personal reflection, guided exercises, and conversations. As you take time to reflect, paying attention to God's hand of direction in your life, you are better able to take steps forward that align with His purposes for your life. Consider inviting others to participate in the Planning Retreat with you, family members or friends. With family, it is an opportunity to build unity for the next year. With friends, the retreat creates an opportunity to share significant conversations.

Allocate eight hours for activities, over several days. Ideally, this is scheduled in a restful location where you can disengage from home and work responsibilities, creating space to reflect and respond. Bring your journal and calendar from the past year. Don't use a journal? No worries. Gather your notes from sermons, lectures, conferences, or books you've read during the year. Print a copy of this guide for each family member or friend who will participate.

SCHEDULE

DAY 1

Breakfast: Instructions

Activity 1: Looking Back

Lunch: Discussion

Activity 2: Values

Activity 3: Dreaming Forward part 1

Activity 4: Dreaming Forward part 2

Dinner: Discussion

DAY 2

Breakfast: Discussion

Activity 5: Giving

Activity 6: Saving

Activity 7: Spending

Lunch: Discussion

GUIDE *for* PLANNING RETREAT - DAY 1

During breakfast, review the schedule for the day. Read a devotion or Psalm 90 as you begin.

ACTIVITY 1: Looking Back *(Approximately 2 hours)*

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Review your calendar and journal from the past year. Using the worksheet on this page, record any key activities, learnings, thoughts, and insights from the year. Consider both your calendar and journal. How did you see God working in your life during this year? Record any themes you see.

	MY CALENDAR	MY JOURNAL	THEME
JANUARY			
FEBRUARY			
MARCH			
APRIL			
MAY			
JUNE			
JULY			
AUGUST			
SEPTEMBER			
OCTOBER			
NOVEMBER			
DECEMBER			

LUNCH: Discussion

Each person shares their personal reflections on the past year. Are there prevalent themes which you see throughout the year? Could you sum up the year in one statement or principle?

Set up the next activity: **Values**

ACTIVITY 2: Values *(Approximately 1 hour)*

Circle your personal top five values. Place them in order of priority below.

Acceptance	Discipleship	Growth	Justice	Selflessness
Accomplishment	Discipline	Guidance	Knowledge	Simplicity
Achievement	Diversity	Happiness	Leadership	Skillfulness
Adaptability	Dreaming	Harmony	Longevity	Spunk
Adventure	Economy	Health	Loyalty	Stillness
Altruism	Education	Helping	Openness	Structure
Assertiveness	Effectiveness	Holiness	Optimism	Support
Beauty	Efficiency	Honesty	Order	Sympathy
Belonging	Empathy	Honor	Originality	Traditionalism
Care for Others	Encouragement	Hope	Passion	Tranquility
Charity	Entrepreneurship	Humility	Peace	Trust
Comfort	Evangelism	Humor	Pragmatism	Trustworthiness
Commitment	Excellence	Imagination	Precision	Unity
Compassion	Fairness	Impact	Preparedness	Utility
Completion	Faith	Independence	Recognition	Virtue
Confidence	Fitness	Ingenuity	Resourcefulness	Winning
Connection	Flexibility	Inspiration	Rest	Wittiness
Cooperation	Freedom	Integrity	Sacrifice	Wonder
Creativity	Frugality	Intelligence	Self-control	Youthfulness
Curiosity	Grace	Joy	Self-reliance	Zeal
Dependability	Gratitude			

MY TOP 5

Share your list and any insights in selecting your prioritized values:

How are these values exhibited in your life currently?

How would you like to see them better illustrated in your life?

How do each person's values intersect with other family member's values?

ACTIVITY 3: Dreaming Forward Part 1 *(Approximately 1 hour)*

Grab a few pages in your journal and envision life five years from now. How old will you be? How old will your family members be? What does life look like? Describe your day from the moment you get up to the last moment of the day. Use the five senses in your description: What does it look like? Feel like? Sound like? Taste like? Smell like? Describe the scene as if you are a bystander peering into your life, recording what you see and hear. Don't worry that your vision will not look like your spouses, or other family members.

It's the year _____ and I am _____ years old now ...

ACTIVITY 4: Dreaming Forward Part 2 *(Approximately 1 hour)*

In the various facets of life, what is most important to you? What do you want to accomplish?

From Activity 1, how has God been directing your steps? What new insights do you have as a result of growing in grace last year? From Activity 2, how will you live out your values this year? From Activity 3, what could you do this year to move closer to the Five Year Vision? If this was your last year on earth, what would be imperative to you to fulfill?

Use the boxes below to process how the thinking you did in each of the first three activities impacts these parts of your life.

	Goals	Timing
Family Relationships	<ol style="list-style-type: none">1.2.3.	
Social Relationships	<ol style="list-style-type: none">1.2.3.	

	Goals	Timing
Physical Health	<ol style="list-style-type: none"> 1. 2. 3. 	
Spiritual Health	<ol style="list-style-type: none"> 1. 2. 3. 	
Personal Development/ Career	<ol style="list-style-type: none"> 1. 2. 3. 	
Giving/ Ministry	<ol style="list-style-type: none"> 1. 2. 3. 	
Financial	<ol style="list-style-type: none"> 1. 2. 3. 	

DINNER: Discussion

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Take turns sharing your responses to Activity 3. Was this a difficult activity to complete? Why? Were there any surprises as you dreamed about the future?

GUIDE *for* PLANNING RETREAT - DAY 2

During breakfast, review the schedule for the day. Read a devotion or Psalm 90 to begin the day.

DISCUSSION

How did yesterday go for you?

Were there any new insights as you rested overnight?

Are there any adjustments you want to make in yesterday's activities?

ACTIVITY 5: Giving *(Approximately 1 hour)*

Resources Available

First, record the aggregate value of the resources entrusted and available to you.

Estimate as needed.

Income projected for next year?

Current net worth?

Looking Backward

What did I give financially last year?

What percentage was this of my income?

What amount of time did I give last year in hours per week/month?

Dreaming Forward

As God so provides this next year, what would I like to give financially?

What amount would stretch me?

Are there organizations or projects with which I'd like to get involved, based upon my one year goals?

What amount of time do I intend to give based upon my one year goals?

Giving Allocation for Next Year

_____ % or \$ _____

Service hours per week/month (circle one) _____

ACTIVITY 6: Saving *(Approximately 1 hour)*

Looking Backward

What amount do I currently have in savings and is this adequate to meet 12 months of basic necessities? Am I taking full opportunity of savings programs available to me?

Is this amount I currently have saved greater than the amount that I need?

Dreaming Forward

Is there a purposeful allocation for savings based upon Activity 3 or 4?

What amount do I intend to save this year?

Saving Allocation for Next Year

_____ % or \$ _____

