
Running an Annual Planning Retreat for Your Church

Most churches have meetings and retreats.

And if the people attending those meetings and retreats were honest, they would say they were not as effective as they should be. In fact, you might even hear the phrase “waste of time” tossed around.

At Church Fuel, we teach a proven meeting rhythm that can help your church identify what is most important and then align your meetings toward seeing those results. Here's the overview:

- The Annual Planning meeting is a retreat built around building an annual plan for the coming year.
- The Quarterly Priority meeting involves the same people and it's where you take the annual plan and come up with 90-day chunks of work to make it happen.
- The Monthly Focus meeting takes less time but it's where communication, issues and leadership development happens.
- The Weekly Meeting is a chance to share success stories, review the numbers and deal with issues.

You don't really need to understand the intricacies of the entire system to benefit from the annual planning retreat. In fact, no matter how well your church is organized, getting the right people together for a few days to focus a growth plan for the next year would be a good thing.

In this article, I want to offer some practical suggestions.

How to run a good annual plan retreat for your church.

Here are six suggestions.

#1 – Decide what you’re going to accomplish.

Before you reserve a meeting room or ask people about their availability, determine the purpose for your retreat and decide what you want to accomplish.

Many churches try to do too much with a short amount of time, mixing in spiritual development with team-building exercises with planning sessions and often resulting in little to show for it other than a good time.

Before you meet, clarify your goals.

- Are you getting together for spiritual development or planning?
- Are you meeting in order to solve a problem?
- Is your goal planning?

Personally, I recommend your annual retreat centering around creating or updating the [one page ministry plan](#). This one-page template has eight sections, giving you a broad enough agenda to allow room for discussion but clear enough guidelines.

Imagine going home from your annual retreat with all eight boxes filled in and ready to go.

#2 – Invite and involve the right people.

The effectiveness of any meeting largely depends on the people in the room, so making sure you have the right people at the retreat is probably your most important decision.

You need people who think church first, ministry second. That's why involving the entire staff or everyone with a specific title is often a mistake. The youth pastor shouldn't drive everything back to youth ministry but should think about the mission, strategy, and goals for the whole church. If you have ministry leaders in the room, make sure they know when to take their ministry leader hat off and put their church leader hat on.

You also need people to understand the value of big-picture planning. If there are people in the meeting who continually draw the conversation back to short-term issues, you'll struggle to get traction. Make sure everyone knows your goal is to look at the big picture, not solve next week's problems. An Elder who loves Jesus and teaching the Bible might not be as passionate about crafting an annual plan.

Make sure everyone in the room will add value and prepare people accordingly.

#3 – Do your homework.

Before you get together for your annual retreat, it's helpful to get some information together in advance. Here are three things you may want to do ahead of time:

- **Take a look at where you are now.** Use the Church Health Worksheet to capture as much real data as you can on attendance, giving, influence, etc. Here is a link to the [Church Health Worksheet](#).
- **If there are big events in your church or community, go ahead and gather all of that information.** You'll want to know school schedules and the dates for major holidays and events.
- **Many churches find that a congregational or attender survey is helpful to take into the planning process.** You could ask people why they love the church, attend the church or give to the church. You can ask about favorite events or preferences. You can ask for message topic ideas.

#4 – Get away.

It's not going to be convenient for every person that needs to attend, but the best annual retreats are out of the office.

Mark Batterson says, "A change of place and a change of pace equals a change in perspective."

That's one reason getting a retreat on the calendar and getting away works well.

Maybe there's a church member who owns a vacation property. Maybe you can save up reward points throughout the year. Maybe you can put it in the budget. But however you choose to fund this retreat, it's worth the expense and effort.

For most churches, a two-day experience will work great. Here's the schedule we recommend.

Day One

9am – Noon: One Page Ministry Plan

Noon – 2pm: Break

2pm – 5pm: Annual Goals

5pm – 7pm: Break

7pm: Dinner and Discuss Issues Raised Throughout Day

Day Two

9am – Noon: Annual Calendar

Customize and change the schedule as you need, but decide on it in advance and make sure there is someone at the retreat who will keep things moving.

#5 – *If possible, bring in someone to run the retreat.*

The best planning retreats and strategic meetings I've been involved in have had one thing in common: someone is in charge.

The person in charge of the church may not need to be the person in charge of the meeting. In fact, great leaders often know there are people more gifted and qualified at important tasks.

This makes sense because some people are better at running meetings than others. Keeping the conversation moving according to the schedule, while still being sensitive to issues that come up...that's a skill. Pushing for a decision after there's been enough conversation...that's a skill.

I've had the opportunity to sit in several strategic meetings kept on schedule by an outside facilitator – a person not officially a part of the organization but hired just for this purpose. And the results are always significant.

There are people who specialize in this. There are specialists who can come in and guide your annual planning process. It's worth it.

Even if you choose to go in a different direction, appoint the best person to be in charge of the retreat and the schedule. It doesn't have to be the final decision-maker.

#6 – End with a calendar session, including follow-up meetings.

By design, you'll wrestle with a lot of big ideas during your annual retreat. But as you come to a close, you'll want to move from ideas to execution.

A calendar is a great place to do this. You can start with the annual calendar, which is more of an "at-a-glance" monthly snapshot. And you can move to specific dates as you have time. But the most important thing is to make sure you know when the big things are happening.

Here are some things you'll want to put on your calendar:

1. **Major church events like Easter or VBS.** Anything that's church-wide should take precedence and you shouldn't plan other things to compete

2. **Communication for those major church events.** When do you need to start planning and start announcing?
3. **When are you recruiting volunteers?** I'm talking about a church-wide emphasis that supports and helps every ministry.
4. **When are you emphasizing groups?** Again, you want to make sure this is church-wide and involves all of your communication channels.
5. **Major teaching series if you know them.** How great would it be if your teaching on Biblical community coincided with the launch of a new semester of groups?
6. **Staff focus days where you can pull out your annual plan and review goals, metrics, and responsibilities.** I recommend one day a quarter.

The annual planning retreat can help you lead your church to healthy growth. It's a great opportunity to step back from the day-to-day operations of the church to focus on the big picture.