

# STRATEGIC PLANNING AGENDA FOR A 3-DAY OFF-SITE RETREAT

## DAY 1

8:00 AM - 5:00 PM

INTRODUCTION TO RETREAT  
CEO/LEADER

*Purpose & Outcomes*

LOGISTICS  
ADMINISTRATIVE

RETREAT PROCESS  
FACILITATOR

*Ground Rules &  
Introduction to Tools*

PRESIDENTS REPORT  
CEO/LEADER

*Current State of  
the Organization*

SWOT ANALYSIS  
FACILITATOR

*Comparisons to  
Previous Year*

————— BREAK —————

CULTURE EXERCISES/DISCUSSION  
FACILITATOR

*Vision, Mission,  
& Core Values*

REVIEW OF PREVIOUS YEAR STRATEGIC PLAN  
CHAMPION OF EACH CATEGORY

*What Worked?  
What Was Changed?  
Progress*

# STRATEGIC PLANNING AGENDA | 3-DAY FORMAT

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## — LUNCH —

IDENTIFY BARRIERS TO ACHIEVING VISION

OPEN DISCUSSION

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IDENTIFY TOP 5 AREAS OF FOCUS

FACILITATOR

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## — BREAK —

DISCUSSION ON RESOURCES AVAILABLE FOR THE YEAR

CEO/LEADER

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SUMMARIZE THE DAY, PLAN FOR TOMORROW

FACILITATOR

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## — BREAK —

### EVENING LOGISTICS

6:00 PM - 9:00 PM

*Happy Hour, Dinner,  
& Conversation*

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# STRATEGIC PLANNING AGENDA | 3-DAY FORMAT

DAY 2

8:30 AM - 5:00 PM

SUMMARIZE PREVIOUS DAY

FACILITATOR

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OPEN DISCUSSION

ALL

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DISCUSSION ON PROCESS

FACILITATOR

*Goals, Strategies,  
Action Plan, Champion,  
Deadlines, Resources*

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IDENTIFY BREAK-OUT GROUPS

ALL

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———— LUNCH ————

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SMALL GROUP WORK

BREAKOUT GROUPS

*What Each Initiative Means  
Why Is it Important  
Align With Vision, Mission, and Values  
Goals/Strategies/Champion*

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———— BREAK ————

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TEAM PRESENTATIONS TO GROUP

BREAKOUT GROUPS

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SUMMARIZE THE DAY, PLAN FOR TOMORROW

FACILITATOR

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———— BREAK ————

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EVENING LOGISTICS

6:30 PM - 9:30 PM

*Bowling, Dinner,  
& Conversation*

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# STRATEGIC PLANNING AGENDA | 3-DAY FORMAT

DAY 3

8:00 AM - 11:00 AM

REVIEW VISION, GOALS, STRATEGIES, & ACTION PLANS  
FACILITATOR

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ESTABLISH ACCOUNTABILITY PLANS/TEAMS  
FACILITATOR

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METRICS, REPORTING, TIMELINES, & FOLLOW-UP PLANS  
FACILITATOR

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WRAP-UP  
CEO/LEADER

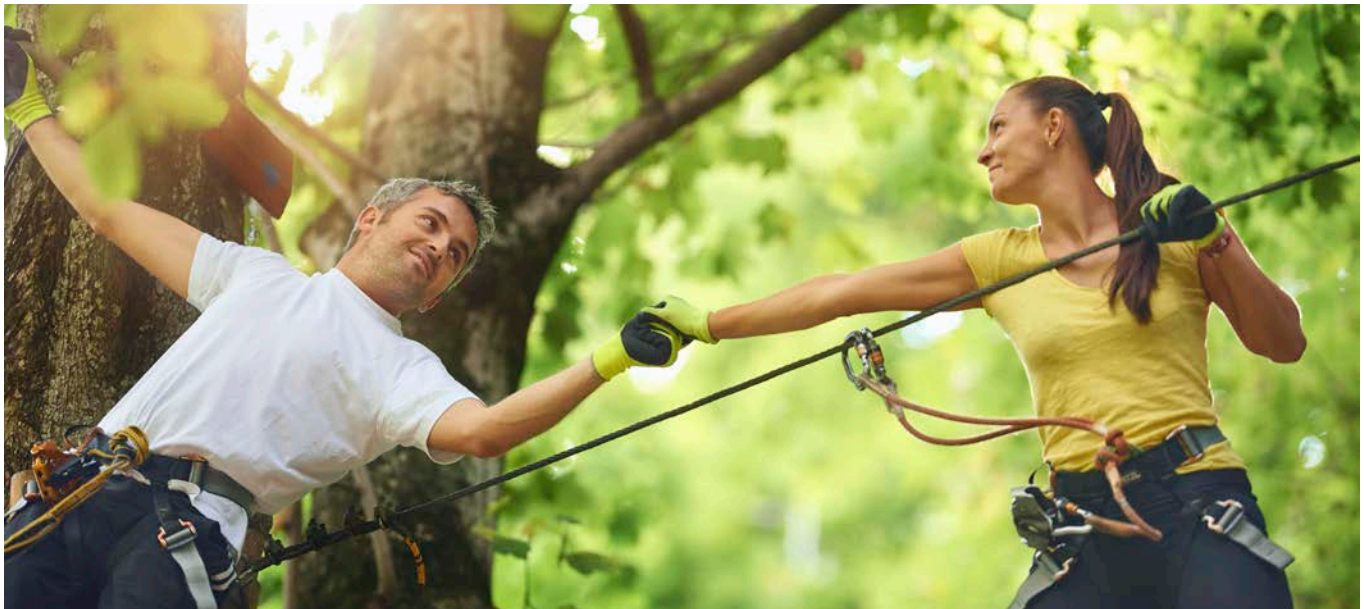
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———— BREAK ————

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**FINAL ACTIVITY**  
12:00 PM - 8:00 PM

*Lunch, Zip-Lining,  
Happy Hour, & Dinner*



**IT'S TIME TO PLAN FOR THE FUTURE! CONTACT LEAD2GOALS TODAY TO SCHEDULE AN OFFSITE STRATEGIC PLANNING RETREAT.**

Lead2Goals can take care of all arrangements from location, to agenda, meals, activities and more.