



WOMEN DOING WELL

# ANNUAL PLANNING RETREAT

*Choosing to Live with Wisdom and Purpose*



## WOMEN DOING WELL

# PLANNING RETREAT GUIDE

*So teach us to number our days, that we may apply our hearts unto wisdom.  
Psalm 90:12 KJV*

Sometimes we spend more time planning a vacation or an event than we spend planning our life for the upcoming year! Give yourself a gift this year. Set aside a day and a half and reap the reward of a year infused with wisdom, clarity and purpose. The Planning Retreat Guide takes you through a process to look back,

*“Life can only be understood backwards, but it must be lived forwards.”  
- Soren Kierkegaard*

to dream forward,

*“There is nothing like a dream to create the future.”  
- Victor Hugo*

and make wiser decisions for the next year that build upon God's voice in your life, your values and priorities.

*LORD, let me know how my life ends, and the standard by which you will  
measure my days, whatever it is; Then I will know how transient my life is.  
Psalm 39:4 ISV*

During the retreat you will enjoy personal quiet space and meaningful guided 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 conversations of significance.



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## TAKING THE FIRST STEPS

Allocate 8 hours for activities, over several days. Ideally, this is scheduled in a restful location where you can disengage from home and work responsibilities creating ample space to reflect and respond.

Bring your journal and your calendar from the past year. What if you don't use a journal to record what you are learning during the year? Gather any notes from sermons, lectures, conferences you have attended 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 pt. 1

Activity 4: Dreaming Forward pt. 2

Dinner: Discussion

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#### Day 2:

Breakfast: Discussion Activity 5: Giving

Activity 6: Saving

Activity 7: Spending Lunch: Discussion



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## GUIDE FOR PLANNING RETREAT: DAY 1

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

*The goal of our life is to live with God forever. God who loves us, gave us life. Our own response of love allows God's life to flow into us without limit.*

*All the things in this world are gifts of God, presented to us so that we can know God more easily and make a return of love more readily*

*As a result, we appreciate and use all of these gifts of God insofar as they help us develop as loving persons. But if any of these gifts become the center of our lives, they displace God and so hinder our growth toward our goal.*

*In everyday life, then, we must hold ourselves in balance before all of these created gifts insofar as we have a choice and are not bound by some obligation.*

*We should not fix our desires on health or sickness, wealth or poverty, success or failure, a long life or short one. For everything has the potential of calling forth in us a deeper response to our life in God.*

*Our only desire and our one choice should be this: I want and I choose what better leads to the deepening of God's life in me.*

**St. Ignatius, from the beginning of the Spiritual Exercises**

### Activity 1: Looking Back (Approx. 2 hours)

Bring: Your calendar and journal from the past year.

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

## Looking Back

My Calendar

My Journal

Theme

	My Calendar	My Journal	Theme
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			



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## 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

*“People and the Word of God are eternal. Most everything else is temporal.  
Make sure you invest in the eternal.”*

**Jerry Sittser, *Discovering God's Will***

## Activity 2: Values (Approx. 1 hour)

Circle your personal top 5 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:**





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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 persons values intersect with other family members values?

## Activity 3: Dreaming Forward Part 1 (Approx. 1 hour)

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. AND don't worry that perhaps your vision will not look like your spouses, or other family members visions.

It's the year . . . . . , I'm . . . . . years old.

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## Activity 4: Dreaming Forward Part 2 (Approx. 2 hours)

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 that moves you closer to the Five Year Vision?

If this were your last year on earth, what would be imperative to you to fulfill?

	Goals	Timing
Family Relationships	1	
	2	
	3	
Social Relationships	1	
	2	
	3	



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	Goals	Timing
Physical Health	1 2 3	
Spiritual Health	1 2 3	
Personal Development/ Career	1 2 3	



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	Goals	Timing
Giving/ Ministry	1	
	2	
	3	
Financial	1	
	2	
	3	

## Dinner: Discussion

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

*O Lord, you know what is best for me. Let this or that be done, as you wish.  
Give what you will, how much you will and when you will.*

**Thomas a' Kempis**



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## DAY 2

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

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 (Approx. 1 hour)

#### Resources Available

First, record the aggregate value of the resources entrusted and available to you on the worksheet below. 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 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?



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## Giving Allocation for Next Year

.....% or \$ .....

Service hours per week/month (circle one) .....

## Activity 6: Saving (Approx. 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 needed for my “finish line”?

### 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 \$ .....



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## Activity 7: Spending (Approx. 1 hour)

Finally, we look at the spending plan. Fill in the net remaining percentage for spending allocation on the worksheet.

Is this amount ample to accomplish the priorities for next year and care for yourself and others for whom you are responsible? (It is recommended that you complete a full budget worksheet for insight into all areas of spending.)

Are there adjustments that need to be made in the allocations either to spending, to saving, to giving?

Are there adjustments to income that need to be considered?

### Spending Allocation for Next Year

.....% or \$ .....

## Lunch: Discussion

How did you experience the Planning Retreat process?

What open questions do you now have for further investigation?

What are the things ahead in the next year which you are excited to pursue?

What areas would you like to have others pray for you specifically?

*Our vocation is not simply to be, but to work together with God in the creation of our own life, our own identity, our own destiny.*

*We are free beings and sons of God.*

*This means to say that we should not passively exist*

*but actively participate in His creative freedom, in our lives, and in the lives of others,*

*by choosing the truth*

**Thomas Merton**