

Sample Team Retreat for Forming Stage

- Friday AM:
 - ½ team members tell their story & why they decided to be a part of the team
- Friday Afternoon:
 - ½ team members tell their story & why they decided to be a part of the team
- Friday PM:
 - Post-it note values discovery activity
 - Team will identify 5 core values
- Saturday AM:
 - Develop team covenant
 - Explain phases of team
- Saturday PM:
 - Based on values team will create a mission statement and 5-10 year horizon vision
- Sunday AM:
 - Strategic planning activity – team will work back from the horizon to develop project phases, goals and benchmarks
- Sunday Afternoon:
 - Determine roles in phase 1
 - Who will do what
 - What holes may still exist?
 - Moving forward what will the core team rhythm be
 - When will we meet?
 - How will meeting be organized?

*Bi-monthly call

*Equipment

*Challenges

*Monthly Team Meeting

*Sharing

*Accountability

*Quarterly Vision Check-In

*Annual Planning Retreat