

CRSIG

Strategic Planning Retreat

October 20, 2025

1120 Tully Road, Modesto, CA 95350

A G E N D A

Monday, October 20th

8:30am **Coffee and Networking**

9:00am **Strategic Planning Session: Focusing on the Task**

- Welcome
- Session focus and outcomes
- Session format and groundrules
- Warm up Discussion

Mission Statement

Central Region School Insurance Group provides risk management and insurance programs to protect the human and financial assets of our members.

9:30am **The Changing Environment (External focus – Opportunities/Threats)**

- Understand the factors that are shaping the self-insurance/joint powers authorities industry and the public agency environments
- Assess the impact on public agency needs
- Define opportunities for CRSIG

10:15am **CRSIG's Position and Performance (Internal focus – Strengths/Weaknesses)**

- Assess performance in key result areas, and identify areas for further development

11:00am **Draft Goal Setting**

- Fiscal
- Member Engagement
- Products and Services
- Communication, Outreach and Influence Goals

<12:00pmLunch>

1:00pm **Prioritize and Define Goals**

- Consider short or long term
- Discuss necessary resources

2:00pm Adjourn for Executive Committee Meeting