STRATEGIC PLANNING
A Guide to Church Planning

Prayerfully planning, so that more of
God’s work gets done...
Because our future depends on it!

The process being used by
the Presiding Bishop
in collaboration with
the General Board
The Change Model

- "I like it this way."
- Ask questions.
- Give data on the results of doing it this way.

- "I can handle this."
- Make sure new behaviors take hold.

**Contentment**
- "I'm different."
- Ask questions.
- Provide buffers and support.
- Don't allow to go back to the first state.

**Renewal**
- "What can I do now?"
- Explain process, actions to take.
- Don't design exceptions.

**Denial**

**Confusion**

Periodically evaluate:
- Where am I?
- Where are others?

Recognize differences in:
- Stages of adjustments to the change
- Stages of grief over lost the status quo
- Various levels of change depending on each person’s situation
The Path: Strategic Planning

1. Vision
   - What is your hope?
   - Your dream?
   - Celebrate!

2. Mission
   - Why does our organization exist?
   - What is our purpose?
   - Are we meeting a need?
   - Guiding Principles
     - What rules will govern us?
     - What do we stand for?
     - What will we never do?

3. Goals
   - What results do we want?
   - That is, what do we want to have at the end of the year/project/effort?

4. Situation Analysis
   - What have we already accomplished?
   - What are our strengths and weaknesses?
   - What obstacles and opportunities exist?
   - How far are we from goal?
     - What’s the gap?
   - Are there adverse impacts if we achieve our goals?

5. Strategies
   - What methods will minimize weaknesses and maximize strengths?
   - What methods will avoid obstacles and enhance opportunities?
   - Will all of these strategies work?
   - How will our methods differ from the competition?
   - What is “our way” of doing business?

6. Reaching Consensus
   - Does the plan draft reflect our discussions?
   - Before proceeding with planning, can we agree on our Mission?
   - Is each goal reasonable and measurable?
   - Are strategies consistent with our mission?
   - Can we agree to move forward in this way?

7. Action Plans
   - What tasks must be completed?
   - By when? By whom?
   - Alternative Actions
     - What products, services or structures are called for to carry out the strategies?
     - What are the apparent costs/benefits of each?
     - Are there adverse consequences of each?
     - Which alternatives will be most effective in reaching goal?
     - Optional: Assign detailed cost/benefit analysis

8. Periodic Follow-up
   - Which actions have been taken?
   - Are adjustments needed?
   - Are goals still attainable?

9. Evaluation
   - Did we meet our goal?
   - What can we learn? Change?
1. Vision

In antiquity, Moses did not merely lead the children of Israel out of Pharaoh’s Egypt to escape the harshness and bitterness of life there. He had a driving vision that propelled him and approximately two million people through the wilderness’s perils, obstacles, and interim defeats to a land flowing with milk and honey.

— Bill Bean, “Strategic Planning That Makes Things Happen”

Ministry without vision is like a surgeon without a scalpel, a cowboy who has lost his horse, a carpenter who has broken his hammer. To attempt a ministry without a clear, well-articulated vision is to invite a stillbirth.

— Aubrey Malphurs, “Developing A Vision For Ministry For the 21st Century”

One does not discover new land without consenting to lose sight of the shore for a very long time.

— Andre Gide

Whatever God’s dream about man may be, it seems certain it cannot come true unless man cooperates.

— Stella Terrill Mann

❖ **Vision** answers this question: “Where are you going? It is seeing ahead, asking God to help you dream about what our church could be or do. It is you completing the sentence: “When I dream of the future of our church, I see a church that…”

❖ **Vision** is developing a clear picture of what the future of our church might look like and agreeing on this.

❖ When you write these dreams and ideas down on paper, you have a VISION STATEMENT. Without a written vision statement, it is difficult to tell where we should be headed.

**Discussing**

- What is your vision for the church?
- What is your hope, your dream for the church in the future?
2. Mission

Once the “what” is decided, the “how” always follows. We must not make the “how” an excuse for not facing and accepting the “what”.

— Pearl S. Buck

Discussing

• What is our purpose?
  – Why does our church exist?
  – Who do we serve?
  – What value do we provide?

• What principles should we be guided by?
  – What rules govern us?
  – What do we stand for?
  – What will we never do in running the church’s business?

Deciding – later

• How will our Mission Statement be worded?
3. Goals

*God is glorified in the fruitage of our lives.*
— John S. Goldsmith

*Shoot for the moon. Even if you miss it, you will land among the stars.*
— Les Brown

**Discussing**
- What results do we want? (What do we want to have in our hands when our efforts are completed?
  - If we could accomplish all that we wish, what would that be?
  - What is the least accomplishment that you will be satisfied with?
  - What is reasonable to expect? By when?

**Analyzing**
- Are these goals consistent with each other? With the mission and our vision for our church?
- What are the opportunity costs if we accomplish these goals instead of other possible goals?
- What will be the consequences if we reach these goals? If we don’t? Are you comfortable with those possibilities? Do you have any concerns?
- Are these goals reasonable?

**Deciding – later**
- When are the deadlines for each goal?
- Are the goals written so as to be measurable?
4. Situational Analysis

What lies behind us and what lies before us are tiny matters compared to what lies within us.

— Ralph Waldo Emerson

An eyewitness of Jesus’ ministry writes: “Walking down the street, Jesus saw a man blind from birth. His disciples asked, ‘Rabbi, who sinned: this man or his parents, causing him to be born blind?’ Jesus said, ‘You're looking for someone to blame. There is no such cause-effect here. Look instead for what God can do.’ ”

— John 9:1-3 The Message

Successes/Opportunities

- What have we already accomplished?
- What are the strengths of our church?
- What opportunities have we taken advantage of in recent months?
- Do new opportunities exist?
- What resources are available to us?

Challenges/Weaknesses

- What are the weaknesses of our church?
- Are there any needs that we have tried, but failed, to meet in the past?
- Are there obstacles that lie in the way of carrying out our mission?

Concerns/Issues/Threats

- What concerns do you have about meeting our goals?
- What other issues must we address in order to complete a strategic plan for our church?

Additional analysis (optional)

- What is the gap between our current status and our goals?
- Are there adverse impacts if we achieve our goals?
5. Strategies

There already exists a path, perhaps several paths, from this point to the place we want to be. The question is which path shall we choose to call our own?

— G. Kaey

In all thy ways acknowledge him, and he shall direct thy paths.

— Proverbs 3:6

Discussing

• What possible way might we go about achieving our goals?
• Considering prior success: what methods made those efforts effective?
• Considering unsuccessful efforts: what methods were ineffective?
• What are key differences between past accomplishments and those things we hope to achieve? Similarities?
• What methods will avoid obstacles and enhance opportunities?
• What methods will enable us to overcome challenges?

Analyzing

• For each alternative strategy,
  – What are the advantages of each strategy?
  – What are the obstacles that lie in the way of carrying out such a strategy?
  – Do opportunities exist for overcoming those obstacles?
  – Are there any adverse consequences to using such a method?
  – Is this strategy likely to work?
• Are these strategies consistent with our vision, mission and guiding principles? Will they distinguish us from other church organizations?

Deciding

• Which strategy is most likely to achieve the best outcome?
• Which strategy is most likely to achieve the minimum outcome?
• Which strategy will be “our way” of reaching our goals?
6. Reaching Consensus

Where no counsel is, the people fall: but in the multitude of counselors there is safety.

— Proverbs 11:14

It is a bad plan that admits of no modification.

— Publilius Syrus

No man is wise enough by himself.

— Titus Maccius Plautus

Discussing (After draft of previous discussions have been distributed)

• Does the plan draft reflect our discussions?
• Before proceeding with planning, can we agree on our mission?
• Is each goal reasonable and measurable?
• Considered together, is it reasonable to expect that we can reach all our goals?
• Should some be deferred or eliminated?
• Are strategies consistent with our mission?
• Which ones will be most effective? Will our members (volunteers) enjoy carrying out these strategies?
• Are there any unresolved concerns that we should list (to make certain they are addressed as we complete our planning)?

Deciding

• Can we agree to move forward in this way?
7. Action Plans

Taking a new step…is what people fear most.  
— Dostoyevski

I merely took the energy it takes to pout and wrote some blues.  
— Duke Ellington

Brainstorming

• In reaching each goal we have set, what specific steps are possible to take to carry out each strategy we have chosen?

Analyzing

• For each alternative action,
  – What are the advantages of each?
  – What are the obstacles?
  – Do opportunities exist for overcoming any obstacles?
  – Are there any adverse consequences to our taking these actions?

• What are the apparent costs and benefits of each?

• Are these steps consistent with our strategy? Looking at it another way: what is your objective in taking this alternative? Is that objective consistent with our goal?

• Which alternative (or combination of alternatives) would be likely to achieve:
  – The best outcome?
  – The minimum outcome?
  – The most realistic outcome?

Researching – as needed

• Conduct a cost/benefit analysis for each of the three alternatives identified above

• Draft a budget for the alternatives being considered

• Develop fund raising plans as needed
Deciding

- What results can reasonably be expected from each of these three alternative action plans? By when?
- Which alternatives will be most effective in reaching our goals?
- Which alternatives will we choose?

Finalizing the Plan – May be deferred to another meeting

- What resources are available? Needed?
- Who will take these actions? When?
- Who will follow up? When?
- Will taking these actions allow us to stop taking any old actions? (Do not assume people will stop doing old actions once new ones are agreed upon.)
8. Follow Up

Every blade of grass has an angel that bends over and whispers “Grow, grow”.

— The Talmud

Measuring

- Which actions have been taken?
- Are costs in line with estimates?
- Are results in line with expectations?

Adjusting

- What have we learned so far?
- Any new facts to be considered? New obstacles? New opportunities?
- Any corrections needed? Any enhancements possible?
- Are goals still attainable?

9. Final Evaluation

- Did we meet our goal?
- What can we learn? Change?

10. Celebrate!

- How can we celebrate our accomplishments?
- Have we expressed appreciation to all volunteers in a private and public way?