

# STRATEGIC PLANNING OVERVIEW



Prepared By

**The Congregational Business Consultants**

Episcopal Diocese of Massachusetts

138 Tremont Street

Boston, MA 02111

Revised: February 2012

## **About This Overview**

Some churches may be experiencing changing community demographics, an aging congregation, underutilized property, a decline in attendance, lack of participation in ministries and programs, and/or demographic changes resulting in a loss of vitality and viability. Other churches may be experiencing growth and are feeling the need for additional space for ministries and programs. In either circumstance or even if things appear to be relatively stable, a church still might consider engaging in a strategic planning process that will provide a dynamic framework for more informed decisions in responding to actual or anticipated changes on the horizon. However, strategic planning is not a process that should be undertaken where there is conflict or division within a church because the conflict or division inevitably will play out in the process and defeat the objective of strategic planning. The conflict or division first must be addressed and resolved. A successful strategic planning process is one where there is an openness and confidence to explore new and different ideas and to accept change.

This overview is intended as a general description of the strategic planning process, the typical contents of a strategic plan and steps involved. Through it we hope that churches will have an understanding of the objective of strategic planning and what is involved: organizing the process, composition of a task force to lead the process, the internal and external analysis required, and the outcome of the process, including delineating goals and objectives, and specific action to be taken to implement the plan. It is not intended as a template.

Every church's situation is different. It will be necessary to develop a work plan that accommodates the particular situation, including who will be involved, the time frame and the specific information to be gathered. In many cases it may be helpful to engage an outside person with strategic planning experience to act a facilitator. Most importantly, the entire congregation should be involved directly or indirectly to generate support for the eventual plan by drawing on it to participate as members of the task force or through interviews as well as through periodic reports.

Please direct any questions or comments regarding this overview to Chris Meyer, [cmeyer@diomass.org](mailto:cmeyer@diomass.org).

## **Strategic Planning Overview**

### **General Guidelines:**

- The goal should be to complete a vestry-approved strategic plan in approximately 12-15 weeks.
- A Strategic Planning Project Task Force should meet for two hours approximately every two to three weeks.
- Individual parish members and others should be interviewed to provide input to the Task Force.
- Relevant background documents should be assembled.

### **Objective of Strategic Planning:**

- The objective of strategic planning is to affirm the congregation's existing model of ministries and programs, leadership practices, and ways to grow in the face of current circumstances even if these seem to be working effectively or to rethink and recreate the congregation in the face of such circumstances . . . to develop a new model, new or improved ministries and programs, new leadership practices, and/or new ways to grow and sustain the congregation. It is a creative process in which change is implicit. It involves information gathering, including interviews to provide relevant information about the congregation and other input, including external perspectives.
- An effective process is one that involves the entire congregation which is led by a Strategic Planning Project Task Force (five to six members) solicited from among the congregation who are appointed by the vestry and requires focus and discipline meeting on a regular schedule (every two to three weeks) over a predetermined time period (less than six months). It is critically important that the composition of the Strategic Planning Project Task Force reflect the various perspectives of the congregation ranging from newer members to long standing members, various age groups and other perspectives (e.g., ethnic, economic, etc.), which are unique to the congregation
- The strategic plan is intended to deliver meaningful, value-added benefits to the congregation.

### **Typical Sections of a Strategic Plan:**

- History of Congregation

- Description of Local Community
- Statements of Mission and Vision
- Description of Committees, Ministries and Programs
- Statement of Core Values
- Strategic Focus/Goals
- Major Objectives
- Actions Steps
- Financial Projections

### **Strategic Planning Process and Development of Elements of a Strategic Plan**

The process falls into three principal phases. The first is developing a profile of the congregation centering on core areas, such as its history, surrounding community, worship, music, Christian education, ministries, administration and leadership, stewardship and finance, property and communication. This is a critical first step because it leads to a deeper understanding of the congregation, its vision and more importantly its core values, which ultimately should serve to inform the goals and objectives. Discerning the core values is the next phase, which involves interviews and/or a survey of parishioners. This invites greater participation and, in turn, ownership in the formulation of the goals, objectives and actions steps, which is the final phase.

#### **History and Community**

- Provide a brief history of the congregation.
- Describe the local community and surrounding communities from which the church draws members, including demographic information, identify size and location of nearby Episcopal churches and those of other denominations.

#### **Mission and Vision**

- The mission statement is an understanding of the congregation's purpose (e.g., worship, formation and mission) and whom and how it serves.
  - Developing a mission statement requires discernment.
  - The mission of the congregation will serve to inform its vision.

- The vision expresses the congregation’s desired future state. What does it want to be in the near future? How will it define achievement? What will make it inviting and welcoming to parishioners, clergy and staff and community?
  - The vision statement should be only 1 or 2 short paragraphs. It should emphasize what is unique about the congregation, such as: “Committed to outreach in the local community . . .” or “Noted for its music program . . .”

## **Ministries and Programs**

- What ministries and programs are needed?
  - What are the demographic characteristics (e.g., age, gender, ethnic, socio-economic, etc.) of the congregation?
  - Is it growing, declining or remaining stable?
  - What ministries or programs is the congregation providing? Regular and special worship services? Christian education and other religious instruction for children and adults?
  - Are these ministries or programs different from those of other congregations? Do these meet the need of the existing congregation? A growing congregation?
  - Make sure “the need” is significant and sufficient not only to support the existing congregation, but growth.
  - Is the value of the ministry or program easily perceived by potential parishioners?
  - An existing congregation should be constantly researching the demographics of the community it serves to determine opportunities to enhance the value of ministries and programs to the congregation and larger community.

## **Core Values, Competencies and Challenges**

- What are the congregation’s core values, competencies or unique knowledge base and skill set that distinguish it and support the congregation? Are these values, competencies, or unique knowledge base and skill set already in place or do they need to be developed? This will involve interviews of individual parishioners and/or survey. (See attached suggested interview guide.)
  - Any new or improved ministries and programs must be created by utilizing the congregation’s core values and competencies.

- The congregation must continually build and strengthen its core competencies to maintain viability and leadership.
- Identify current and future challenges.

### **Primary Audience**

- Who is the primary audience? Everything flows from this—ministries, programs, funding.
  - Congregations will have more than one audience --- parishioners, funders, collaborators, communities. Only one will be the primary audience.
  - How is the primary audience defined? Age, gender, socio-economic location, etc.?
  - What are the means by which the congregation communicates its message/mission to outside community prospects?
  - Is the congregation’s invitation easily perceived?

### **Environmental Assessment**

- What is the external environment? Congregations should be monitoring always the external factors that affect ongoing actions. A helpful resource is Percept ([www.percept.com](http://www.percept.com)) that provides faith-based demographic information by integrating data about religious attitudes, preferences and behavior. Key areas to analyze are:
  - **Outside Perceptions:**
    - How is the congregation perceived by other Episcopal clergy within the Diocese, clergy of other local denominations, members of other local churches, local citizens who do not attend church goes, city or town officials and local media?
  - **“Competitor” Churches:**
    - Who are the congregation’s “competitor” churches?
    - How do the congregation’s ministries and programs differ from “competitor” churches?
  - **Technology:**
    - How is new technology affecting the congregations’ activities?
    - Is technology a threat or an opportunity?
  - **Social Change:**
    - Is the congregation’s positioning consistent with existing and emerging societal and demographic trends?

- **Other External Factors:**
  - Are there other external factors that need to be considered, e.g. economic trends affecting the community, etc.?

## Strategic Focus

- What is the strategic focus?
  - This is the most important section of the strategic plan. It should state the broad directional focus or goals of the congregation for the next 3 years.
  - It is where the foregoing analyses/assumptions all come together – audience needs, values, core competencies, challenges and environmental assessment.
  - These areas of focus are developed from a deep knowledge of the primary audience, a realistic appraisal of the congregation’s ministries and programs, capabilities, and valid assumptions about external factors.
  - Include new or revised ministries programs and initiatives required to execute this strategic plan. Common areas of strategic focus might be:
    - Worship, including worship styles, number, types and varieties of services.
    - Formation, including church school, youth and adult Christian formation.
    - Mission, including in-reach/out-reach, new ministries/programs/initiatives.
    - Sustainability, including financial goals, lay leadership development, clergy and staff development, property use and maintenance and information technology.
  - Avoid the laundry list syndrome!
    - Do not identify more than 4 or 5 areas of focus
    - Do not include tactics to achieve the focus areas. They belong in a separate section.
    - Each of the 4 to 5 focus areas should be restated into measurable objectives. Try to quantify each objective into dollars, ministry/program/initiative, members and dates so they can be tracked.
    - Below each objective, list the 3 or 4 tactical steps required to achieve each objective. These are the specific courses of action to be taken, which may include creation of task forces and charge to develop such details, including time frames, where greater parish involvement may be helpful.
    - Identify the individual or committee responsible for achieving each objective.

## Financial Projections

- The congregation should prepare a 3 to 5 year financial projection taking into account annual goals for number of parish member families, pledge units, outreach services and dollars.
  - Use a spreadsheet format listing non-financial and financial measures (operating revenues and expenses) for each year.
  - Include the previous 2-year actual operating revenues and expenses to help evaluate the feasibility of the projections.
  - The bottom line should be break-even or, ideally, show a small surplus.

### **Approval and Implementation**

- Obtaining support of the vestry and congregation for the process and final strategic plan is critical. Steps should include:
  - Commissioning Strategic Planning Project Task Force at church service.
  - Periodic updates from Task Force to vestry.
  - Final report to vestry for approval of goals, objectives and action plan and presentation to congregation at annual or special meeting.
  - Educate and engage the congregation so that it will fully support and embrace the goals and objectives that have been established.

### **Summary**

- The project goal is to develop a simple, focused and achievable strategic plan.
  - It should be a working document for clergy, staff and vestry and easily understood by parishioners.
  - Accept that it will change during the implementation phase, and will need to be updated each year as environmental conditions change.

### **Planning Process**

- **Meeting #1:**
  - Describe strategic planning process and work plan.
  - Identify relevant documents and individuals to be interviewed.

■ **Meeting #2:**

- Review history, mission, vision, ministries/programs provided and statement of need.

■ **Meeting #3:**

- Identify values, core competencies, challenges and primary audience. Initiate interviews and/or survey of parishioners. (See suggested interview guide.)

■ **Meeting #4:**

- Identify external influences (environmental assessment).

■ **Meeting #5:**

- Review vision statement and identify areas of strategic focus.
- Discuss objectives and tactics.

■ **Meeting #6:**

- Continue discussion of objectives and tactics.
- Discuss financial projections.

■ **Meeting #7:**

- Discuss implementation issues.
- Review draft plan before submission to vestry.

Interview Guide

**1. Best Experience:** Reflect on your entire experience with XYZ Parish. Recall a time when you felt most alive, most involved, spiritually touched, or most excited about your involvement. Tell me about this memorable experience that you have had with XYZ Parish. Describe the event in detail. What made it an exciting experience? Who was involved? Describe how you felt? Describe what you did as a result of the experience?

**2. Values:** What are the things you value deeply: specifically, the things you value about yourself, being a parishioner and/or XYZ Parish.

**3. Core Value:** What do you think is the core value of XYZ Parish? What values give life to XYZ Parish? What is it that, if it did not exist, would make XYZ Parish totally different than it currently is?

**4. Three Wishes:** If you had three wishes for XYZ Parish, what would they be?

**5. Goals:** If you were charged with developing goals for XYZ Parish for the next five years, in order of preference, what are your top three? How would you know the goals had been met?"

451645.1