

Strategic Planner's Notebook

TABLE OF CONTENTS

(Click on the title for the handout)

[INTRODUCTION](#)

[MISSION STATEMENT](#)

[CORE VALUES](#)

[SWOT ANALYSIS](#)

[VISION STATEMENT](#)

[PRIORITIES](#)

[PROGRAM EVALUATION](#)

[GOAL SETTING](#)

[MINISTRY EVALUATION](#)

Strategic Planners Notebook

Introduction



INTRODUCTION:

I. The Church & Agenda Harmony

- A. "All of our agenda harmony discussions must begin with a correct **doctrine of the church**, what we believe about the church." (Ephesians 3:10)
- B. **Beliefs Affect Behavior**: What do we believe about the church and agenda harmony? What we believe will directly affect how we behave!" (Ephesians 5:25-27)
- C. Agenda Harmony
1. **David** – Psalm 133:1,3
 2. Definition – Agenda: "an outline or plan of the things that must be done"
Harmony: "a unified arrangement of parts with a common focus"
 3. **Jesus** – John 17:21,23
 4. **Paul** – Philippians 2:1-2
- D. **Church Climate...Definition**:
"...the prevailing attitude toward church health and agenda harmony held by a critical mass of pastoral and lay leaders within a church."

II. Spiritual Strategic Planning

A. Overview

- Give you a planning tool
- Goal is for you and your church to be more effective
- Teach and implement a basic planning process
- We want to establish a planning habit

B. Thinking and Planning

- Planning is simply "bringing the future into the present"

Not, "Are we doing things right?" but "Are we doing the right

- things?"
- Assess current reality and take positive steps

C. What Strategic Planning is Not

- It does not always flow smoothly from one step to the next
- It is not a ride on a smooth train
- It is not a one-time event, but is on-going!

III. Biblical Basis for Strategic Planning

A. "We should make plans, counting on God to direct us."

Solomon -- Proverbs 16:9

B. "Any enterprise is built by wise planning, becomes strong through common sense, and profits wonderfully by keeping abreast of the facts."

Solomon – Proverbs 24:3-4, TLB

C. "For I know the plans I have for you," declares the Lord, "plans to prosper you...plans to give you hope and a future."

God -- Jeremiah 29:11

D. "Then the Lord said, "Write down the vision and make it plain on tablets so that those who read it may run with it. For the vision awaits an appointed time...Though it linger, wait for it; it will certainly come and will not delay...but the righteous will live by faith."

God -- Habakkuk 2:2-3

E. "Where there is clear **vision**, people do not perish."

Solomon - Proverbs 29:18

IV. What Is God Thinking?

- Our greatest need...is NOT to know what we're thinking, but what God is thinking! (1 Cor 2:9-13,16)

Exercise #1: Seeking Godly Wisdom

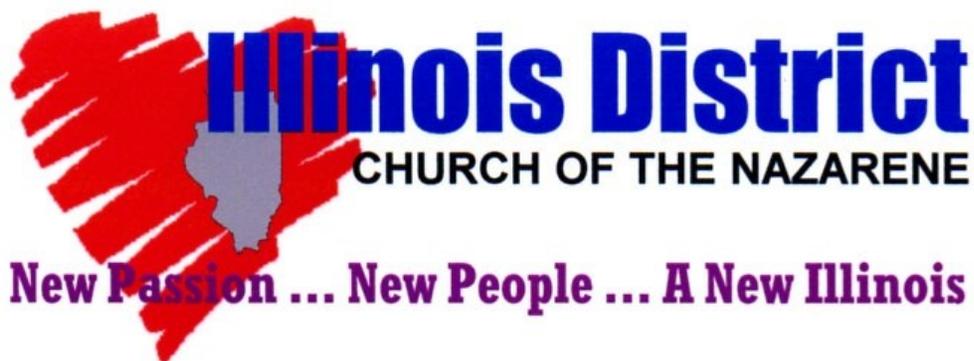
Spend 7-10 minutes around the table, praying specifically for the following items:

- 1) that God's agenda will become clear to us,
- 2) for team rather than individual agendas to dominate,
- 3) for agenda harmony as we move forward,
- 4) for the kingdom of God to come and His will be done among us...,
- 5) for wisdom as we build our church mission, vision & core values together,
- 6) wisdom for the pastor and board members who lead us
- 7) thanking God for His promise in James 1:5-8, a promise for His wisdom in this process.

Other:

Strategic Planners Notebook

Mission Statement



I. MISSION STATEMENT

Key Questions in Building a Strategic Plan

1. Who are we?	MISSION & VALUES
2. Where are we?	NEEDS
3. Where does God want us to go?	VISION & PRIORITIES
4. How are we going to get there?	GOALS & PLANNING
5. When will it be done?	SCHEDULING
6. Who is responsible for what?	DELEGATING
7. How much will it cost?	BUDGETING
8. Did we do it?	EVALUATING

1. Who are we?

- Who are we?
- Why are we here?
- Why does our church exist?

Defining our Mission:

- A mission is a broad, brief statement of what the church is supposed to be doing.
- It should be short enough to be learned and put on a T-shirt. (we suggest you keep it to no more than 7-8 words.
- The words are important but the process is more important. Key factors are **clarity & participation**.
- **Helpful Questions:** What is the church's purpose and reason for being? Why does the church exist? What makes our work and role valuable? What makes people feel that they cannot do without the church?
- **Two Versions:** The longer one may be more descriptive and complete. The shorter one is the one that matters most. Popularize it in 5-8 words, memorize it and refer to it often!

Strategic Planners Notebook

Core Values



II. CORE VALUES

Developing Clear Core Values:

Core Values Defined: What do we value? Guiding principles and deeply held convictions about how the church will behave when it is fully healthy.

Key Questions To Ask: What does more than stir our emotions...what arouses us to action? What do we get passionate about? What do we want our church to be known for?

Three Basic Kinds of Values:

Assumed values What we think are our current behaviors
and beliefs

Preferred values What we hope will be our behaviors and
beliefs

Actual values What actually are our current behaviors

How We Can Determine Our Church Values:

By examining the following 4 things:

- a. The church calendar
- b. The church checkbook
- c. The church board minutes
- d. The church conversation (what we talk about)

Exercise #3: Church Core Values

Key Questions: What do we value? What would we like our church to be known for? What stirs us emotionally and causes us to act? (or should?)

Discuss: Take 20 minutes and discuss the three questions above. (This is based on what you know of the church calendar, church expenditures, church board decisions and the church conversation you engage in). Make a list of 5-6 core values that you believe **should** guide your behavior as a church. Together make a master list for your congregation. **Church Recorder**, gather and record your core value list for your strategic Church Action Plan.

Next Church Action Steps: After this seminar is over, what action steps should we take as church leaders related to developing our core values? These will begin the development of our **Church Action Plan**.

Exercise #4: ReFocusing Our Attention...

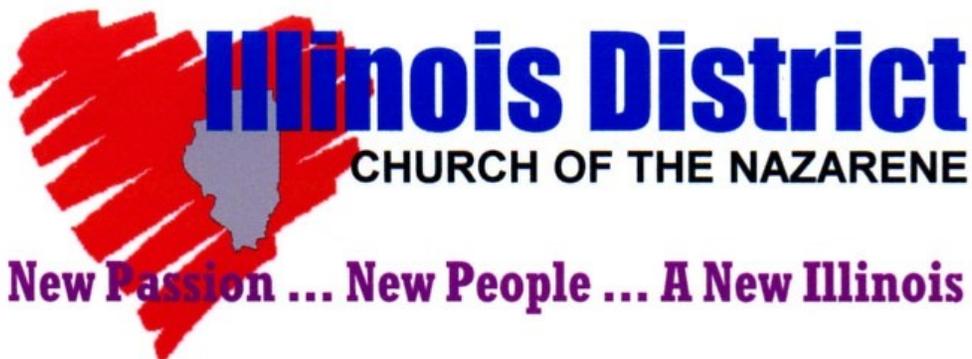
Individual: Take 5-10 minutes and answer the following two questions. **#1:** What should we care more about as a church? **#2:** What should we care less about? Write your answer down to these two questions before you begin discussions.

Discuss: Take 10-15 minutes, discuss the above 2 questions and come to agenda harmony as a group, selecting the **one thing** for each question that we should care more about and care less about. **Church Recorder**, gather the individual lists from people and add this to your strategic Church Action Plan.

Next Church Action Steps: After this seminar is over, what action steps should we take as church leaders related to ReFocusing our Church Attention? These steps will add to the development of your **Church Action Plan**.

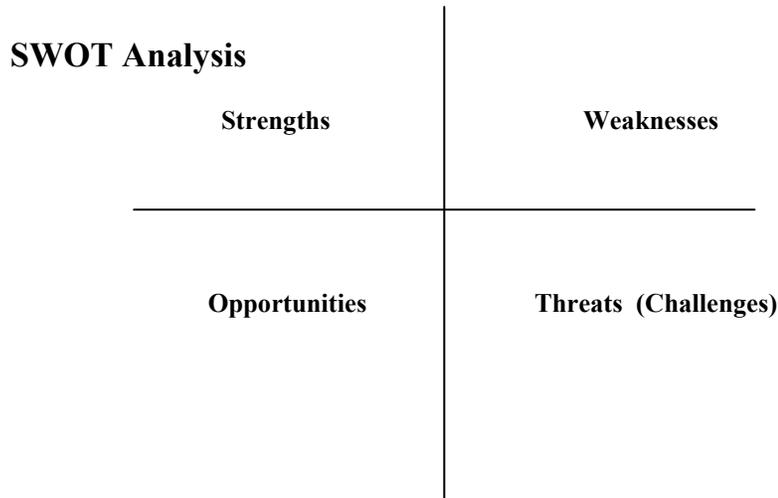
Strategic Planners Notebook

SWOT Analysis



III. SWOT ANALYSIS

2. Where are we?



Exercise #5: S.W.O.T. Analysis

Individual: Take 5 minutes and make a list of 3 strengths you have as a church. Take another 5 minutes as individuals and on a separate sheet of paper, make a list of 3 weaknesses or areas in which your church needs to improve.

Discuss: After 10 minutes of discussion, together create a summary list of 3 strengths and 3 weaknesses of your church. The **Church Recorder** should capture a summary of everyone's strengths and weaknesses to include in the strategic Church Action Plan document.

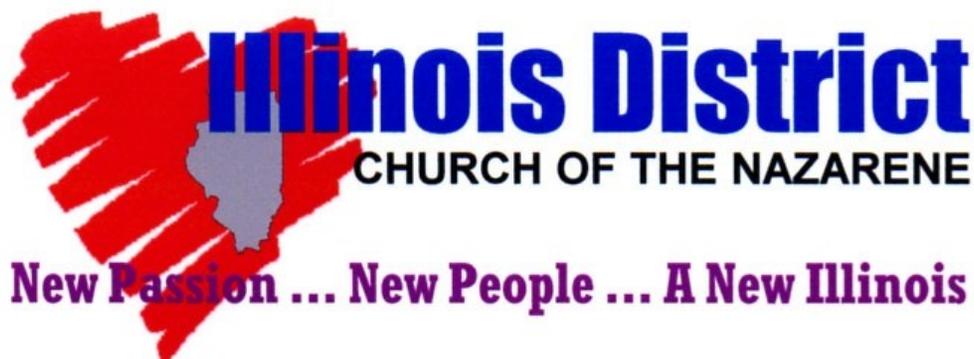
Individual: Take 5 minutes and make a list of what you believe are the 3 biggest needs (opportunities) you have as a church in facing your future.

Discuss: After 15 minutes of discussion, together create a summary list of the 3 biggest needs and opportunities you need to focus on as a church. (**Keep open** to the Holy Spirit today, He may want to adjust your focus as you proceed!) **Church Recorder**, capture a summary of these 3 biggest needs and opportunities we currently face.

Next Church Action Steps: After this seminar is over, what action steps should we take as church leaders related to addressing these key needs & opportunities we face? These steps will add to the development of our **Church Action Plan**.

Strategic Planners Notebook

Vision Statement



IV. VISION STATEMENT

#3. Where do we believe God wants us to go?

Developing Our Church Vision:

- Where is God leading us?
- What should our future be?
- What do we do as a church that makes us indispensable to the community God has called us to serve?

Our Church...7 Years From Now:

- Biblical Instruction (Hab 2:2-3), write the vision down, make it plain to read.
- It should describe where we are going.
- It should describe what the church will look like 7-10 years from now.
- It should develop a mental image and picture that motivates people.
- Sees a healthy church and all of our church departments functioning in a healthy way.
- A shared church vision sees the future taking place, before it begins happening.
- (Romans 4:17; Hebrews 11:1,6)

Exercise #6: Our Church Vision

Key Questions:

Where is God leading us? What should our future be? What can we do as a church that will make us indispensable to our community as we serve them?

Individual:

Take 10-15 minutes and begin recording vision bullet points for the following. You have just been handed the authority to direct the future of your church over the next 7 years. As well, you have been given all the resources you will need. In bullet points, describe what 7 years from now will look like.

Discuss:

Share your individual vision bullet points. Take 25-30 minutes and together create a summary statement for your church of what the future will look like.

Church Recorder, capture a summary of these bullet points for future strategic church planning.

Next Church Action Steps:

After this seminar is over, what action steps should we take as church leaders related to the development of a clear vision? These steps will add to the development of our **Church Action Plan**.

Strategic Planners Notebook

Priorities



V. PRIORITIES

#3. Where do we believe God wants us to go?

- This requires not only a clear vision, but also **clear priorities**.
- What are the most important areas that we should focus on?

Determining Our Church Priorities

- How do we determine if our current activities & priorities are the right priorities?
- How do we as church leaders determine where to focus our activity in the future?

Exercise #7: Determining Our Church Priorities

Key Questions:

- What do you see as church “high pay-off activities?”
- What church activities help us to most fulfill our purpose & mission?
- What activities help answer the question of why the church exists?

Individual:

- Take 10 minutes and write down what you feel the top 5 priorities our church currently has.
- This is based on what we talk about and what we currently do.

the top 5 priorities of our church should be. They should be designed to achieve our mission, vision and live out our core values, what we say is VERY important to us.

Discuss: Once everyone is done with forming their list of top 5 priorities of what they feel currently is AND what currently should be, take 20 minutes, discuss and come together in agenda harmony to make a master list for your church. This should include both the top 5 priorities we currently have **AND** the top 5 priorities the church should have in the future.

Highlight the ones that you believe will require significant commitment and adjustment from what is currently being done within the church.

Church Recorder, gather and write down the list of the top 5 priorities to include in our strategic Church Action Plan.

Exercise #7: (Continued)

Determining Our Church Priorities

Individual:

- Now take 10 minutes and write down what you feel the top 5 priorities of our church should be.
- They should be designed to achieve our mission, vision and live out our core values, what we say is VERY important to us.

Discuss:

- Once everyone is done with forming their list of top 5 priorities of what they feel currently is AND what currently should be, take 20 minutes, discuss and come together in agenda harmony to make a master list for your church.
- This should include both the top 5 priorities we currently have **AND** the top 5 priorities the church should have in the future.

Highlight the ones that you believe will require significant commitment and adjustment from what is currently being done within the church.

Church Recorder, gather and write down the list of the top 5 priorities to include in our strategic Church Action Plan.

Next Church Action Steps:

After this seminar is over, what action steps should we take as church leaders related to developing our top priorities? These steps will add to the development of our

Church Action Plan.

Strategic Planners Notebook

Program Evaluation



PROGRAM EVALUATION

Six Steps In Evaluating Priority & Program Fit

Step #1: First, the priorities of the church must be established & clarified before you proceed.

Step #2: Begin to evaluate how our church programs **fit** our priorities. Reflect and discuss the answers to the following **3 questions**.

- a. What percentage of our programs serve our agreed-on highest priorities?

- b. Are our current programs marching our church toward the achievement of our mission and highest priorities?

- c. Do our current programs reflect what we want to be known for?

Lots of church activity does not insure mission accomplishment.

Step #3: List the 10 best programs or activities currently active within our church. (Most churches have Sunday School, music, youth, missions, evangelism, children's programs, etc.)

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

Step #4: List the Top Five Priorities of our Church (from Exercise #7)

1. _____
2. _____
3. _____
4. _____
5. _____

Step #5: In the step #3 section which lists our programs, place an "X" behind those programs that complement our "**Top Five**" priorities.

Step #6: Now in the list below, prioritize what you feel are the "**Top 5**" programs or activities within the church that generate the most "return," and produce the greatest spiritual benefit for achieving our church's mission and vision.

1. _____
2. _____
3. _____
4. _____
5. _____

Strategic Planners Notebook

Goal Setting



VII. GOAL SETTING

Goals must be connected to our vision and our core values.
Goals must move us toward becoming a healthy church.

S.M.A.R.T. & Good Goals

S pecific

M easurable

A ction focused

R ealistic

T ime constrained

Achieving goals in the future require priorities.

Once our church priorities are clear, the goals become much easier!

Action Plan – Goal Worksheet

The sheet on is used to show the relationship between specific tasks that must be accomplished and the people who are involved. It's particularly helpful when:

1. A goal's achievement that has been decided on, is seen in a series of steps.
2. You want to clarify accountability for these steps or tasks to be carried out.
3. Deadlines are critical.
4. This tool is **designed to answer questions 4-8** in the Spiritual Strategic Planning process.
5. Using the Church Action Plan – Goals Worksheet puts down in black and white who is accountable for which steps and by what date.

Steps To Follow:

- State the goal in writing.
- Determine who is responsible for the goal's achievement
- Answer the question: How will we reach this goal?
- Clarify accountabilities and get final agreement from the team.
- Make sure to involve those who will be responsible for implementing the plan in this part of the process.
- Make sure the plan makes sense and is action focused.

#5. When will it happen?

- Understanding the difference between long term goals and short term goals
- Achieving goals always involves taking little steps
- **Develop and communicate a realistic Timeline:**
 - A well-thought out timeline will help add credibility to your plan.
 - A well-thought out timeline will build accountability into your plan.

#6. Who is responsible for what?

#7. How much will it cost?

- ⇒ Determine the budget needed for the accomplishment of each goal.
- ⇒ Build the budget, so that the budget is driven by the Mission, Vision, Core Values and is connected to the Church Action Plan priorities we have agreed to.

CHURCH ACTION PLAN – GOALS WORKSHEET

Goal # __:

Responsible Person:

How will we reach this goal?

<u>#</u>	<u>Action Plan Step</u>	<u>By</u>	<u>By</u> <u>Whom</u>	<u>When</u>	<u>Cost</u>	<u>Done</u>
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						

Strategic Planners Notebook

Ministry Evaluation



VIII. MINISTRY EVALUATION

LOCAL CHURCH MINISTRY EVALUATION

Now let's take a moment and look at the ministries we now have in existence. Which ones are successful? Which ones are unsuccessful? How is success and failure measured?

Successful Ministries

Success Measured By

1. _____
2. _____
3. _____
4. _____
5. _____

Unsuccessful Ministries

Lack of Success Measured By

1. _____
2. _____
3. _____
4. _____
5. _____

MINISTRY DESIGN AND EVALUATION WORKSHEET

1. Name of Ministry: _____

2. Ministry target group: _____

3. The purpose of this ministry is _____

4. The measurable results of this ministry are:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

5. Briefly state the ministry plan: _____

6. Date Begun: _____

How long has it been in operation? _____

Date projected to Begin: _____

Date projected to Complete: _____

Time Span ministry will cover: _____

7. Leadership Requirements:

a. How many leaders (supervisors) are necessary in order to effectively implement this ministry? _____

b. What skills/abilities will be required of them?

1. _____

2. _____

3. _____

4. _____

c. What training is required to equip these leaders? _____

8. Support Personnel:

a. How many support personnel (workers) are necessary in order to effectively implement this ministry? _____

b. What skills/abilities will be required of these workers?

1. _____

2. _____

3. _____

c. What training is required to equip these workers? _____

9. Facilities needed:

a. How much space will be required in order to effectively implement this ministry?

b. What special facilities or arrangements may be required?

10. Budget:

a. What is the total cost (estimated) of the ministry? \$ _____
What is the yearly cost? \$ _____ Monthly? \$ _____

b. What is the revenue (estimated) from the ministry? \$ _____
What is the revenue yearly? \$ _____ Monthly? \$ _____

11. Other insights concerning this ministry are: _____

12. During the past year, how many man hours have been invested?

a. Planning/supervision (leaders) $\frac{\text{_____}}{\# \text{ ldrs}} \times \frac{\text{_____}}{\text{hrs}} = \frac{\text{_____}}{\text{man-hrs}}$

b. Implementation (workers) $\frac{\text{_____}}{\# \text{ ldrs}} \times \frac{\text{_____}}{\text{hrs}} = \frac{\text{_____}}{\text{man-hrs}}$

c. Participation (recipients) $\frac{\text{_____}}{\# \text{ ldrs}} \times \frac{\text{_____}}{\text{hrs}} = \frac{\text{_____}}{\text{man-hrs}}$

13. What degree of success have we seen in each area of measurable results previously identified?
(see # 4)

Measurable Result Area	Great Success	No Success
a. _____	9 8 7 6 5 4 3 2 1	
b. _____	9 8 7 6 5 4 3 2 1	
c. _____	9 8 7 6 5 4 3 2 1	
d. _____	9 8 7 6 5 4 3 2 1	
e. _____	9 8 7 6 5 4 3 2 1	

14. When the time, energy and money spent on this project are related to the effectiveness of the ministry, it can be rated:

9 8 7 6 5 4 3 2 1
very effective neutral very ineffective

15. This ministry should be: _____ terminated.
_____ studied more closely.
_____ begun / continued as planned
_____ expanded.

16. Date of this evaluation _____ by _____
(person or group)