

Basic Strategic Planning

Tom Bandy

I thought about using the title “Strategic Planning for Dummies”, imitating the popular book series that introduces difficult topics to ordinary people. I have a core value for humor, but I also have a core value not to offend. However, I find that many traditional church folks really don’t know basics of planning. They often go about it backwards (i.e. worrying about money before they have even focused the tactics). Or they often get carried away by a great idea they saw in Florida while on vacation and implement it without any thought for mission and leadership. More profoundly, in our fast paced world every brilliant leader today is a dummy tomorrow, so we are all constantly learning.

Let’s assume that your church has a foundation of trust. This means there is some clear consensus about shared positive behavioral expectations (core values), core convictions on which people stake daily living (bedrock beliefs), and a motivating congregational purpose (vision and mission). The leaders are in a planning retreat deciding what ministries to continue, end, or add.

Be sure to include every ministry or program ... and I mean every one. Include your traditional worship service, Sunday schools, nurseries, and anything else you usually do and consider to be sacrosanct. And include every creative idea, no matter how radical or expensive it might seem at the moment. Everything is set before God prayerfully and faithfully. This is how you approach it.

Why?

This is always the first question. Don’t worry (yet) about how to do it or whether you can afford it. The first question is: “Will it advance our congregational vision and mission or not?” The congregational vision and mission should be already aligned to God’s fundamental action to redeem the world, and the universal church’s fundamental mission to multiply disciples. Your particular congregation has a piece of that.

Your primary mission field is defined by the average distance people in your community (neighborhood) drive to work and shop. The US Census can tell you the commuting time for people in your zip code. Measure it in miles in every direction. All of the lifestyle segments and peculiar publics inside that circle is the primary mission field God calls you to connect with his redeeming action.

Will this ministry (program, creative idea, etc.) help those publics experience some form of God’s grace through your church? Will it deliver the mission results you anticipate as a congregation? Is there a compelling reason why you think the Holy Spirit is calling you beyond this mission field (regionally, nationally, or globally)?

Think of the mission of your congregation. Now think of the ministry program or idea. If you don’t immediately say “Well, of course we should do this!” take it back to God in prayer.

Who?

This is a more important question than “what”. In the old days, we used to imagine a program and then recruit people to do it. They burned out and even the best program perished. Today, in a time of limited volunteer resources, you have to start with leadership. Who will lead the ministry? Who has the spiritual gifts? Who feels personally called?

Aside from mission alignment, leadership is the most important choice you have to make. There should be a clear connection between the personal mission of the potential leader and the ministry idea or program (often revealed by their “passion” for the project). Do not be guided simply by someone’s apparent skills. Volunteer ministries always require extra time and energy, and it is only passion that will fuel the commitment to carry the ministry through.

If we can safely assume that your church has been praying about mission, and casting visions for possible mission targets and projects, then lack of emerging leadership is a likely signal that the Holy Spirit is not in it at this time. Regardless of how good the idea is, wait. Otherwise you will be like the foolish builder described by Jesus who started a tower but could not finish it. Success depends more on leadership than anything else.

What?

Now you consider strategies. These should be strongly influenced by the leader or leaders who have a passion for the mission (program, project, or creative idea). Often the strategy originally assumed to be workable in your mission field, by your volunteers, is revealed to be inefficient or unreasonable. However, now that you know the program or idea is aligned with mission and has leadership, you can begin to reshape the tactics to suit your resources and purpose.

In order to discern the best strategy you have to define exactly what you hope to accomplish? What should be the impact for individual or social change? How will you measure success? Too many churches get sidetracked by procedures and processes, and forget to define results. They get all the permissions, make sure teams are age and gender-balanced, and complete all the forms, but when the next planning meeting comes around nobody knows if the strategy really worked.

Defining the anticipated measurable results is sometimes called “ends policies”. It is very important that the “ends” connect with your mission purpose as a congregation. Therefore, make sure that what you are trying to achieve is clearly Christian. First and foremost it should reveal your core values and bedrock beliefs. You would be surprised how often churches do philanthropic things that poorly represent or even contradict their own convictions, simply because some outside agency, government, or non-profit thinks it is a good thing to do.

For those of you who have been impatient, we have finally gotten to tactics. You will notice in your planning session, however, that some of your ongoing programs and some of your ideas have already been set aside. Some of these programs may well be “sacred cows” that you have done forever, but which today fail to align with mission, elicit passion, or get results. This has also happened to some of your favorite new ideas. If you are an advocate of these and are disappointed, don’t be angry. Be prayerful. If the Holy Spirit is in it, the mission, passion, and goals will become clear in the future.

When?

The first tactical question is about timing. How long will it take to prepare for implementation? Some continuing programs and new ideas will require significant lead time to train volunteers or even answer the next few tactical questions.

When during the year, the season, the week, and/or the day should the ministry happen? Notice that the timing is not determined by the convenience of the church. It is determined by the convenience of the mission field (i.e. by the public toward whom the ministry is aimed). This is particularly important when considering new worship options, for example. Churches constantly make the mistake of scheduling programs around their internal affairs and fail to be sensitive to seekers.

The decisions about timing should also include when evaluations will occur and when the ministry will be shut down. Churches often forget this, and it isn’t long before this year’s “creative idea” becomes next year’s “sacred cow”. Since you have already spent time defining anticipated measurable results, you should be able to evaluate success. Even if the ministry is renewed each year, it should be prioritized and evaluated along with everything else.

How?

The next tactical discussion will be to define the skills, technologies, and methods through which the ministry will be implemented. Most of the details can be left to the leaders who are passionate about the ministry. However, you have finite resources and it is good to at least broadly describe how the ministry will be accomplished.

This is your opportunity to think “out of the box”. Mission today is increasingly “contextual”. That means the tactics that work for one church may not work for your church. It is very difficult to simply buy a curriculum from some publisher, or borrow a program from some megachurch, or download a ministry from the head office and make it work. Now is the time to look across boundaries of public sectors, denominational allegiances, and local practices to be inspired by the innovations of others. Then customize it for yourselves.

One of the common mistakes made by churches in strategic planning is that they assume all of the skills must come from within the membership, and all of the technologies must be mastered by the membership. In fact, you can partner, network, and borrow the talents and expertise of others beyond your church. Remember, you have already made sure that measurable results will reveal your core values and beliefs, and you can protect integrity even as you borrow expertise.

Where?

If the program has to be implemented on existing church property, or housed in the current church facility, you may need to renovate space or install new technologies. This might mean removing walls and revising floor plans, or upgrading plumbing and electricity, or adding digital learning options. The discussion here might also push the church to return to the first three steps of the planning process to evaluate if they are using their current limited space wisely. Churches often rent space to outsiders, to fulfill their own mission purposes, thereby limiting the space available for their own mission purposes.

Today many ministries need to be located beyond the existing church property or facility. The older the church building, the less versatile it is to effectively get mission results for many ministries. Moreover, as the public becomes increasingly skeptical of the church, many publics simply will not enter the churchy environment of your building. Do what St. Paul did. Take the mission to the people, and don't expect the people to come to the mission.

Notice that the discussion of “where” to do it follows after the discussion of “how” to do it. Too many churches try to fit the ministry into unsuitable space, rather than choosing a space that facilitates the ministry. Consider renting space (vacant retail space, community centers, or even unused light industry space) to house outreach ministries, coffee houses, worship services, and other options.

How Much?

This is the last tactical question you should consider. Much to the detriment of God's mission, however, it is often the first that churches consider. Churches in North America take a kind of morbid delight in believing themselves to be poor. Some are. Most are not. Too many churches cut back on mission when they should be escalating their stewardship. There is almost always money for mission ... if properly motivated. That is why we began the planning process with mission, leadership, and anticipated results. If that is all in place, money will be forthcoming.

Wise churches never subsidize any ministry. They seed every ministry, and equip leaders to raise the rest from within or beyond the church. This is what allows even small churches to have big mission impact. Wise churches also encourage mission-driven debt as a sign of faith and proof to a skeptical public that they are really serious about mission. Mind you, this is reasonable debt and not foolish debt. The rule for the general budget of a church is that the debt service for mission should never exceed 20% of the

operating budget of the church. A similar rule can be applied to any particular debt incurred by any ongoing or new ministry.

The truth is that the real cost of discipleship is not financial. The real reason many churches cancel programs or back away from creative ideas is not financial. There is a price to be paid ... but the price will always be in changing traditions; altering attitudes; acquiring, firing, or training leaders; reorganizing power centers; and building, selling, or renovating sacred space. If the church celebrates mission, recognizes passionate leaders, and is clear about anticipated results; and if the church is confident in the tactical implementation; and if the church is prepared to pay the price of faithfulness to do whatever it takes to accomplish God's mission; then nothing is impossible.

I know. All this sounds too good to be true. Over 80% of the churches in North America are small churches than worship less than 100 people. Sometimes those people are poorer than average. Yet time and again we see that church leaders who follow this method of strategic planning are able to do incredible things ... locally, regionally, and even globally.

During your planning retreat, there are three things you must do before starting the strategic planning process. First, you need to pray. Offer to God everything you are, and everything you have, to accomplish God's purpose of redemption. Remember: God will take you up on it. Second, revisit your foundation of trust (shared values, beliefs, vision and mission). This is your compass that will guide all ministry decisions and allow you to set priorities without undue conflict. Finally, know your mission field. Understand the diversity of publics ... and spiritual needs ... within the primary mission field God has entrusted you to proclaim the Gospel.

At the end of the planning retreat, many church leaders find themselves returning to their original assumptions about shared values, beliefs, vision and mission. Continuing traditional programs, and initiating creative ideas, test the real ownership of the congregation for mission. Does the church really own the continuance of traditional programs, or initiation of creative ideas, or are these just the "pet projects" of a few influential people? Are ongoing programs or new ideas really feasible given the current standard of quality, or do they require more training than church leaders at first imagined? Are new initiatives scary or exciting to church members? Do they real fire the imaginations of the people?

Similarly, at the end of the planning retreat, many church members find themselves wondering about the realities of their mission field. Are people "out there" really longing for more quality organ music? Or are they really searching for more insights from the Jesus Seminar doubting the historical Jesus? Or are they really hoping that the church will provide more opportunities for pot luck suppers? Do our programs and ministries really address the spiritual hunger of the publics in our zip codes (postal codes in Canada and Australia)?

If your planning retreat ends with these lingering questions, it is time for the staff and board to get busy. They need to answer these questions. The future of your church depends upon it. The relevance of God's mission to redeem the world depends upon it. I find that many churches (and church leaders) assume that what they do really does not ultimately matter to God. I urge you to reconsider. The Bible is clear. You have been entrusted with so much talent. You can bury it in the ground, or you can invest it wisely in the future. There is one thing you will need to understand. However small or great the talents your small or large church possesses, God will hold you accountable for the results. Smarten up!