

STRATEGIC PLANNING

A RESOURCE FROM THE CENTER FOR CONGREGATIONS

WHAT IS STRATEGIC PLANNING?

Define strategic planning. In the book, *Holy Conversations*, Gil Rendle and Alice Mann share a unique operational definition of strategic planning. “Strategic planning is a structured conversation about what a group of people believe God calls them to be or to do.” [p. 3]. Strategic planning is an intentional process by which congregational leaders identify future priorities for their congregations based on mission and take the steps necessary to implement those priorities into the life of the congregation. Strategic planning is an ongoing process that keeps the congregation focused on its mission and on its future actions.

Planning Prompts. Often congregational leaders engage in strategic planning when their congregations are growing and they want to determine the next steps in their development; when facing a major change or event, such as relocation, building, capital campaign or retirement of a long-time pastor; or to re-energize when the congregation is declining.

Reach out. When members of a congregation engage in strategic planning they are often seeking to be more faithful and effective in their mission and ministry. They want to grow as a community of faith and develop ministries to fulfill their mission and meet the needs of their community.

Along the way. Strategic planning allows for interaction and conversation within a congregation. During the planning process, members of the congregation often affirm the congregation’s mission and core values. They assess the current situation, discussing environmental trends and visioning. Leaders formulate, communicate and approve goals, objectives, and strategies. They focus on implementation, budget, evaluation, and updating of the final plan.

SHOULD WE USE A CONSULTANT?

Consultants vs. Do-It-Yourself. There are many resources to guide strategic planning. Consultants bring experience, knowledge, and an objective voice to the process. The cost of their services, however, may be prohibitive. A variety of website, video and print resources are available for self-directed strategic planning. Each resource is not right for everyone. Pick the option that best fits your congregation.

Think outside the box. Most strategic planning consultants emphasize the process, interaction, and conversation more than specific program planning. The strategic planning process generates insight so that the congregation can respond nimbly and wisely rather than being locked into a plan that may not be relevant several years down the road.

HOW DO WE FIND A GOOD CONSULTANT?

Ask around. Get recommendations from friends and colleagues at other congregations who have been through a strategic planning process. Check with your denominational office or the Center for Congregations.

Decide what you want. List the criteria you think are important in a good consultant. These criteria might include congregational background, feeling of connection, adaptability of the process, affordability and so forth.

Narrow the field. Once you have a variety of recommendations from the above sources, narrow the field to two or three you want to interview.

Ask the right questions. The interview is an important part of the selection process. Don’t be afraid to ask tough questions so that you feel comfortable making a decision about which consultant is right for your congregation. See sidebar on “Interviewing the Consultant.”

Get it in writing. A consultant should submit a formal proposal to you in writing about their process. The document should identify the roles of the consultant, team, and clergy in the process and include cost and payment arrangements.

WHAT CAN WE DO TO BE SUCCESSFUL?

Create a team. Appoint a team to guide the strategic planning process. Select persons who are passionate about the congregation. Include informal as well as formal leaders. The strategic planning team should be representative of your congregation in terms of age, gender, race, length of membership, socio-economic, and cultural aspects. This kind of committee profile encourages fresh thinking and a variety of perspectives.



INTERVIEWING THE CONSULTANT

- What kind of congregations have you led in strategic planning?
- What is your process and timeline?
- What is the cost for your services? What does this cost include? How do you bill for services?
- What we need to do to prepare for your work?
- Who from our congregation is involved in the process and what are their roles?
- How do you adapt the process for the unique context of our congregation?
- What is your role as a consultant in the implementation phase?
- Are you available by phone to answer questions and/or to discuss issues along the way?
- What type of documentation will you provide at the end of the process (report, action plan, etc.)?

Understand your congregation. Spend time exploring your congregation's past, assessing where you are now, and visioning for the future.

Be accountable. Develop mutual expectations that articulate what you expect from the consultant and what the consultant expects from your congregation. It is important to review these expectations throughout the planning process. If you are using a self-directed process, decide times and ways to report to your board and congregation.

Honor your tradition. Be clear how you want your faith tradition to be part of the planning process. All congregations are unique. Those characteristics that set you apart are your strength and your individuality. Stay true to them.

Strategic Planning is part of the Using Resources series, which is published by the Center for Congregations to help congregations make effective use of specific kinds of resources. It is our hope that you will find them useful in your work as a congregation.

12/2016

Know the players. It is important to know who is involved in the strategic planning process and what they will be doing. What will the consultant do? What will the congregation do? What roles do the pastors and staff play? If using a self-directed process, who will facilitate it?

Get the word out. We recommend a participative approach. Engage the congregation in the process as much as possible. Maintain good communication about the process and discoveries along the way through the newsletter, website, bulletin, etc.

Fill your toolbox. Other tools available to assist your congregation in strategic planning include demographics, growth statistics, assessment surveys and denominational studies. Research studies conducted by social service agencies can often reveal trends that are useful as a congregation prepares for the future.

Plan for implementation. Be deliberate about how your strategic plan will be implemented. Decide who will be responsible for what and when. Budget the necessary financial and human resources to be successful.

Resources You Can Use

For resources on this subject, you're encouraged to check out the Congregational Resource Guide (CRG) at <http://thecrg.org/>. Suggested CRG search terms: vision, planning, consultant, assessment, assessment tools, demographics.

Center staff are happy to talk to you about strategic planning or other topics. You can contact the Center office nearest you or email info@centerforcongregations.org.

