

STRATEGIC PLANNING IN CONGREGATIONS

A RESOURCE FROM THE CENTER FOR CONGREGATIONS

Community Church is a growing faith community on the edge of a major metropolitan area. Attendance has reached the capacity of the facility and staff. Now they ask, “What can we do to accommodate those who want to come to our church?” They engage a strategic planning consultant to help them navigate this complex transition.

Hope Chapel has recently experienced the end of a successful, 30-year pastorate. Following an interim period they call a dynamic young pastor to lead them. Poised on the edge of a new era of ministry and mission, the congregation hires a consultant to help them answer the question, “What do we do now?”

New Beginnings is a new church start with about 50 members. Located in a small Midwestern town, they have been worshiping in a storefront for more than a year. They have purchased property on the edge of town, but momentum for building has come to a standstill along with membership growth. The small group is divided over how much debt they can assume and how large the congregation should be before starting to build. When the pastor learns there are denominational resources to assist the congregation in moving forward, they decide to pursue a strategic planning process.

First Church is an 80-year-old congregation in an established city neighborhood. The current pastor arrived following a difficult pastorate that ended in dismissal and congregational decline. Within a few years of his arrival, attendance rebounded by fifty percent and then stalled. Recent financial shortages have become cause for concern. They engaged an outside consultant to help them find a way to thrive, not just to survive.



Whether taking steps to remain vital, address rapid growth or gradual decline, answer the “What next?” of a just-completed building program, navigate a pastoral or staff change, or whether the crucial 40-year mark in the congregation’s life cycle, all congregations find themselves in need of strategic planning at some time. In fact, strategic planners interviewed for this inquiry suggest that a regular cycle of strategic planning is essential for vital congregational ministry.

WHY STRATEGIC PLANNING?

The mission of the Center for Congregations is to help Indiana congregations find and use resources to address their challenges and opportunities and to share the Center’s learnings with the wider community. Over the past ten years, strategic planning has emerged as a common challenge for congregations. To learn more about the breadth and depth of strategic planning resources, the Center explored the work of strategic planning consultants and the experience of congregations. This report shares those findings. Many congregations do their own strategic planning with a variety of resources. The focus of this report is on strategic planning which is guided by



EVERYBODY HAS SOMETHING TO OFFER in wisdom and insight, so the idea is to create the environment where everybody's wisdom is respected and shared.

outside consultants. It is based on information from interviews conducted by the Center during 2005 and 2006 with strategic planning consultants and the congregations who engaged them.

While this report does not presume to be comprehensive on the topic, we do believe this study is unique in that it explores current practices based on the self-described work of 13 consultants and the experience of consultation as described by leadership teams from six midwest congregations.

METHODOLOGY

This exploration is called a "resource inquiry" to convey its conversational/narrative nature and to distinguish it from the more formal process of "research."

Thirteen strategic planning consultants with regional or national practices participated in 90-minute telephone interviews in 2005. They responded to a set of questions designed to elicit descriptions of their process, theoretical and theological foundation, data collection practices, written reports, evaluation, and level of involvement in implementation and follow up. They also answered practical questions about issues such as fees and time frames.

The consultant sampling included Protestant, Catholic, and Jewish men and women, clergy, and lay, some of whom work solely with congregations, others who divide their work among government, non-profit and jurisdictional entities. A few are relatively new to this work while most have spent a decade or more in the practice. All are witness to ongoing learning as they interact with congregations across the country, each unique in time, place, gifts, and calling.



The congregations interviewed are located within the eight-county

Indianapolis metropolitan region which constitutes the Center for Congregation's Central service area. They represent six denominations: Episcopal Church, USA; Evangelical Lutheran Church in America; Lutheran Church-Missouri Synod; Roman Catholic; Presbyterian, USA; and United Church of Christ. In each case the pastor and at least one lay leader with experience in the congregation's planning process were interviewed. They participated in 90-minute, on-site interviews in 2006.

STRATEGIC PLANNING WITH A CONSULTANT

The dynamics and outcomes of a congregation's work with a strategic planning consultant are perhaps best conveyed through the story of one congregation. The story of Community Church (an aggregate of several congregations interviewed) continues....

I'VE GOT TWO FEARS ABOUT STRATEGIC PLANS: One is that they are well done and they are never used. The other is that they are well done and always used - missing opportunities because they "aren't in the plan."

FINDING AND HIRING A CONSULTANT

Once the congregation determined that they wanted to bring in an outside consultant, the pastor sought help in identifying potential candidates. A small task force was charged with interviewing and recommending a consultant whose style and process were deemed a good fit for the congregation. Their choice was contracted for a total of six days over a period of 18 months. His fee was \$1200 a day plus expenses.

While Community Church underwent a thorough interview process to identify their consultant, other congregations engaged folks with whom they were already familiar or who were recommended by their denominations. Still others chose consultants for reasons unrelated to their ultimate goal, such as the first one to return their call. Availability and cost also played a role in congregations' final decisions.

Some consultants utilize readiness assessment tools as part of the introductory process to help determine if there are other issues that need to be addressed in the strategic planning process. The Transforming Church Index is one such tool (<http://thecrg.org/resources/tag-consulting-transforming-churches>).

Community Church and the consultant entered into a written agreement which specified time frame, costs, deliverables (written report, for example), lines of accountability, evaluation, mutual expectations and an exit clause.

GETTING TO WORK

Once the consultant was engaged, he met with the governing board. With guidance from the consultant, the board chose a group of seven people for the planning team and directed them to serve as liaisons between the consultant, the board and the congregation.

LED BY THE SPIRIT

This consultant set the stage for strategic planning by asking, "Where is God leading you?"

INFORMATION GATHERING

The planning team used a congregational survey provided by the consultant to garner information on their

ministry, membership demographics, level of members' involvement and individuals' impressions about the congregation's ministry.

The information-gathering phase of strategic planning solicits congregational preferences, opinions, demographics, perceived needs, issues, hopes and concerns. This can take the form of written surveys and questionnaires, document reviews, meetings, and individual and small group interviews with staff, core leadership and congregation.

One consultant used the information-gathering phase to discover group perceptions about roadblocks and distinct ways of experiencing the same roadblock. "I'm trying to hear how people are framing the issues themselves," the consultant explained. Another congregation did an environmental scan using Percept data at <http://perceptgroup.com/>. This information educates the consultant, the leadership team, and the congregation and aids in setting direction and agenda for the process.

ENVIRONMENTAL SCAN

To engage the planning team in reflection on their ministry and context, the consultant led them through the SWOT Analysis, an environmental scan whereby the group identifies the congregation's internal strengths and weaknesses and its external opportunities and threats.

IDENTIFYING THE POSITIVE CORE

Two weekend retreats were held over six weeks for the planning team and congregational leaders.

The group engaged in conversations to identify the positive core of the con-



gregation, naming things the congregation does well, recalling times when the congregation was at its best, brainstorming its personal, economic, physical, relational, and institutional assets. They studied scripture and prayed together to discern God's will for the congregation. They crafted a vision statement to capture their sense of what God was calling the congregation to be and do. And they drafted a mission statement to name areas of emphasis and approach. This sort of work can also be done over a series of weekly or monthly meetings and with a combination of planning team, core leadership, and congregation at large.

COMMUNICATION

Regular and various means of communication kept the congregation informed and involved, allowing opportunities for input and feedback at crucial points along the way. These communication methods included newsletter and bulletin articles, pulpit announcements, all-congregation "Town Hall Meetings," bulletin board displays and small group gatherings.

CONSENSUS

The consultant facilitated conversations that enabled the congregation to reach consensus on their vision and mission statements. Later, they translated the vision and mission into concrete plans for ministry by asking, "What will the congregation do in order to realize the mission we have claimed?". Consensus was reached and a final plan was presented at a special congregational gathering. Its acceptance was celebrated with a meal and brief dedication.

IMPLEMENTATION AND FOLLOW UP

Community Church's consultant worked with them to formulate an implementation plan, which would

be carried out after the consultant finished his work. Although follow up and implementation were not part of his contract, he remained available for phone conversations as needed.

Most strategic planning consultants' work ends with the adoption of a strategic plan. As with Community Church, the plan generally includes implementation steps outlining what will be done, when, and by whom. The consultant is seldom present to facilitate this phase unless contracted to do so. According to a number of the consultants interviewed, final responsibility for implementation usually rests with the senior minister. Congregational interviewees did not state this conviction.

EVALUATION

Community Church's consultant used a written evaluation form with the planning team at the close of his work with the congregation.

In our study, formal evaluation tools and processes were not employed by most consultants nor were they requested by the congregation. As one lay leader put it, "We considered the congregation's adoption of our plan to be a positive evaluation of our work."

HOW ARE THEY DOING?

Community Church's vision and mission statements have become standards by which all their planning is measured. If a ministry or program does not align with the mission, the leadership considers whether it will be eliminated or whether the guiding statement needs to be revisited.

Often, it is the statement which stands. For example, when a neighborhood preschool program housed at the church chose not to include limited religious program-



ming, they were asked to relocate. While the decision to ask a long-standing and highly regarded program to find new quarters was painful, the existence of the mission statement gave the congregation the rationale for making their decision. The departure of the school freed up needed space for a growing Christian Education program and helped the school find quarters better suited to its needs.

The congregation is acting on their plan in other ways – they have hired an associate minister to accommodate their growth and purchased adjacent land for more parking. In time, they plan to expand their building.

Their vision statement is prominent. It is featured on the church’s letterhead, worship bulletins and newsletter. It is part of leadership retreats, committee meetings and the fall stewardship campaign. It influences the choice of the congregation’s annual ministry theme.

More than just a plan for action, this experience gave Community Church a clear sense of identity and focus. It gave them tools and skills – increased their capacity – for thinking and acting strategically long into the future. This is strategic planning at its best.

WHAT WE’RE LEARNING

WHAT MAKES THE PROCESS EFFECTIVE?

- The consultant has experience in and respect for congregations. “If you don’t have a clear respect for how God has been at work in the past and is at work in the present, you can’t truly help them understand how God is going to work through them in the future,” said one consultant;
- The leadership of the congregation is solidly behind the process;
- The congregation as a whole is kept informed and involved;

VISION VS MISSION: The terms “Vision Statement” and “Mission Statement” are often used interchangeably. Here they are used, respectively, to distinguish between a statement describing the “Big Picture/hoped-for future” and the manner in which that future will manifest in a particular setting.

- Leadership team is comprised of individuals who can think creatively, can make the time and energy commitments, and can command the respect of the congregation;
- Consultant can bring relevant information and teaching to the process, although these can also be found in a variety of other forms such as books and videos;
- Congregation is not attempting to plan in the midst of a crisis or deep conflict;
- Adept facilitation by the consultant brings skills, processes and tools that help the congregation identify and communicate their convictions about the congregation and its ministry;
- Both congregations and consultants seemed to agree that the conversation about the plan is at least as important as the plan itself.

It seems that many of the factors that make a consultant-led strategic planning process effective would also make a self-led congregational process effective.

COST IN TERMS OF TIME AND MONEY

The average cost ranges from \$10,000-\$15,000 and can go as high as \$25,000-\$30,000, depending on the level of services provided. The higher price typically includes expanded consultant services, such as coaching and/or guiding the congregation through the implementation phase of the strategic plan. Fees can be adjusted (up and down) by the scope and duration of the project, on-site presence, coaching and telephone consultations. Some use a sliding scale based on the size of the congregation.



Fees can be negotiated. The Center for Congregations offers matching resource grants to support strategic planning consultations for Indiana congregations only.

MOTIVATIONS FOR HIRING A CONSULTANT

- As a regular practice in a healthy congregation;
- To address Life Cycle issues (See George Bullard's *Pursuing the Full Kingdom Potention of Your Congregation*, chapter five, "Recognizing the Life Cycle and Stages of Your Congregation's Development);
- Staff or lay leadership transition;
- Demographic shifts such as rural areas becoming suburban, suburban areas becoming urbanized, urban decay or renewal;
- Congregational merger;
- Issues related to expansion, moving, new construction or remodeling;
- Financial reversal;
- Lack of confidence or skills for congregations to do strategic planning themselves;
- To relieve staff of the facilitation role. One pastor reported bringing in an outside consultant "in order to keep me from controlling the process;"
- Availability of financial support.

THE ROLE AND IMPORTANCE OF LEADERSHIP

Sometimes denominational and congregational policies dictate the roles clergy and laity will play during a strategic planning process. These policies may have to do with the nature of authority and the source of vision/mission. Nevertheless, the buy-in of congregational leadership, both clergy and lay, is essential.

The process demands time and energy of staff and leadership. Using an outside consultant can allow the staff

to be more involved in the process itself or to remain on the fringes to allow stronger congregational buy-in of the process and outcome.



THE VALUE OF A POSITIVE FOCUS

Focus on what is right or the positive core of the congregation. "We don't talk about what's wrong, we talk about what the strengths are. The assumption that if you find something that is wrong you can fix it to a level of strength is a false assumption," explained one consultant.

"Congregations soar with their strengths, not by solving their problems," said another consultant.

OUTCOME IS MORE THAN A PLAN

As experienced by Community Church, the outcome of a strategic planning process is more than a written roadmap to the future. Congregations benefit from the process in a variety of ways.

Enhanced community as a result of the conversations: "The brainstorming allowed me to connect with individuals I did not normally interact with," said one lay leader;

Increased congregational involvement: "It pulled all these people together, people who ordinarily were on the fringe of participation. They came out of the woodwork and became leaders in one way or another," reported a lay leader. A pastor described, "I see people engaged in the life of this community, and even if it's just ticking off items on the list of things they said they were going to do, things are happening that I did not have to direct. ...We are beginning to share the work."

Plans fulfilled: "We have a whole new way of welcoming people. Lights are coming soon to change the dim lighting in the narthex. We took down the hedge (that blocked the church from the road). We've added an alternative worship service, which we are phasing in very slowly. We are upgrading our website," one lay leader said.

DEFINING STRATEGIC PLANNING

Consultants define strategic planning as...

“...A form of planning that addresses the fundamental questions of ‘Who are we?’ ‘Where are we going?’ ‘What are we all about?’

“...Helping an organization envision its preferred future and identify the steps required to move in that direction.”

“...An ongoing approach of strategic thinking about the future. The one word that sums it up is ‘intentionality.’”

“...Creating a focus that allows an organization to adapt to any internal or external challenges that may present themselves along the way.”

“...A process by which an organization takes a look at itself and its surroundings and tries to align its purpose with those surroundings.”

Heightened strategic intelligence as a result of the process: The congregation is able to think strategically about a range of issues and opportunities.

Relying on the “plan” or on the vision/mission for direction and evaluation of programming: “We keep our vision and mission statement in front of us 24/7 and unless our activities and programs and worship fall under this vision and mission, we ain’t gonna do them,” stated a lay leader.

A strong sense of identity and focus: “We have a road map for the future and a clear articulation of who we are,” said a pastor.

Building on the experience by enriching ministry in ways not anticipated by plan: “(We) started with a need to think about the future, but that initial thought was not as involved and broad as it would become. That’s clearly the work of the Spirit,” stated a pastor.

WHAT THEY’RE SAYING

“A certain small group does not hold the keys to knowing what God wants us to do. We discern the Spirit as a community.” –Pastor

“I don’t believe we would be here without this (experience). I think we would still be floundering, going thirty different directions.” –Lay leader

“We have a plan. The trick is making it become the natural way we do things around here.” –Pastor

“It’s about being mindful of practical things and how you can be the best stewards of what you have.” –Pastor

“Life seems to get in the way, even when we plan it well.” –Consultant

OBSERVATIONS

- The best processes result in congregational clarity of vision and missional identity. These processes equip leadership to guide and empower the congregation to align their missional identities with the way they live their lives together. They acknowledge there is no “quick fix.”
- The cost of outside consultants is prohibitive to most congregations. All the congregations we interviewed reported that the availability of significant financial support enabled them to consider hiring their consultants. If the cost of hiring outside consultants is prohibitive for most congregations, what resources are available to help congregations facilitate their own processes? What is essential in such resources?
- Formal evaluation processes were neither included by consultants as part of the basic contract nor requested by the congregations



we interviewed. When they did conduct an evaluation, it was an informal process, generally a kind of backward glance eliciting an emotional response.

QUESTIONS

- How can congregations engage in meaningful evaluation that will help inform future strategic processes?
- What elements in the strategic planning process best prepare congregations for implementation?
- How can congregations incorporate into their lives the necessary work of strategic planning without regularly hiring an outside consultant?

RECOMMENDATIONS

Congregations need to request a consultant to prepare a written contract outlining the following:

- Scope of the project (what they will do)
- Timeline for completing the various activities of the project
- What they will deliver (research, analysis, final report, etc.)
- Fees (either a flat fee or a per diem in which case a maximum number of days is articulated)
- Expenses (an estimation of travel, lodging, meals, printing, etc.)
- Payment schedule
- Termination clause (usually a mutually agreeable termination if necessary)
- Accountability (It is recommended that one person in the congregation monitor the work of the consultant according to the terms and conditions of the contract.)

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: strategic planning, vision, strategic, consultant, assessment, assessment tools.

Strategic Planning in Congregations is part of the Special Report series. This piece is intended to help congregations understand the use of outside consultants to guide strategic planning. Six congregations in the midst of strategic planning contributed their stories. Input also came from planning consultants who utilize differing methodologies. Although the congregations in this article bear fictitious names, they are based on the characteristics of the congregations interviewed.

Written by Marie Fleming
Photography by Chris Minnick

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