
STRATEGIC PLANNING PROCESS

Description

The Strategic Planning Process is an exciting time of utilizing results from the Take Your Church's Pulse tool, as well as further work and prayer together to choose the best direction for your church and its ministry. Looking to the future for at least the next three years, the Strategic Planning Process helps determine what actions your church will do, why your church will do them, and how your church will accomplish them. With the strategic plan, you can be confident that biblical, sensible, and reliable details are communicated well. The result is a church with personnel focused together on accomplishing God's Kingdom work in the best possible way!



more churches, stronger churches

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NARRATIVE ASSIGNMENTS

Description

The first four Strategic Planning Worksheets are narrative, which means that they require some written work and dialogue among colleagues to achieve the best results. These worksheets are best completed in small groups who come together as a large group to report and receive feedback. The final products of these worksheets will be written documents.

WORKSHEET 1

VISION:

How to Create a Vision Statement

CONCEPT

The VISION STATEMENT is a clear and simple description of what you believe God wants your congregation to be. It should communicate an overall view of your congregation in its ideal state. However, it should not be so vague in wording that it loses the ability to focus people on definite action. Also, it should describe a state of being that you must work towards, not one that already is accomplished (in that case, it would be a slogan or motto).

FOUR EXAMPLES OF A VISION STATEMENT:

1. *"We will be (or, "we are") a church full of the Holy Spirit, growing in the likeness of Christ."*
2. *"We will be (or, "we are") the light of Christ in the darkness of our community."*
3. *"We will be (or, "we are") a community of faith that shines with the righteousness and hope of Christ in our congregation, city, and other parts of the world."*
4. *"We will be a righteous and faithful congregation, serving the lost as well as fellow believers in our community, region, and around the world."*

Note that each vision statement reflects what God has taught us in His Word about what His church should be like. However, the statements are not equal in effectiveness as vision statements.

THE FIRST STATEMENT describes a state of being that could be partially true now, with improvement expected over time. It does not contain specific characteristics of the congregation or ministry action to work towards.

THE SECOND STATEMENT is more vague and could be true at any time in various ways. Again, there is no mention of the characteristics of the congregation, or of any level of ministry action.

THE THIRD STATEMENT is fairly complete, as it describes the characteristics of

the congregation (righteous and hopeful in Christ) and where they will minister (congregation, city, and other parts of the world). Both the characteristics and the reach of the ministry are elements to work towards

THE FOURTH STATEMENT is the most complete. It communicates characteristics of the congregation, the intended recipients of the ministry, and the physical reach of the ministry. These ideals are clearly stated and the content is biblical.

ACTIVITIES

1. In small groups or in pairs, list several single words that describe your congregation as if it were just right according to biblical principles—the way you believe God wants it to be! Some words might be: righteous, faithful, loving, joyful, compassionate, generous, etc. These words describe the congregation's character. List these descriptive words by using each one to complete the sentence:

God wants us to be... _____

2. Next, list to whom you believe you are to minister. Communicate your list by using each item to complete the sentence:

God wants us to serve... (who?) _____

3. Finally, list several actions that your congregation will be doing when it is in its ideal state. These may be phrases. Some examples are:

- Taking the gospel to the world
- Ministering to all ages in our community
- Engaging all members in spiritual discipleship
- Growing regularly in financial strength

You can list these actions by using each one to complete the sentence:

We will express our character through... _____

4. Now, discuss with your partner or small group the words describing the congregation's ideal character, who it will serve, and the phrases indicating

your congregation's ideal actions. Choose the most important three on each list and write them down.

5. Finally, write a vision statement that uses the most important descriptive words, ministry recipients, and action phrases. (You may use the third or fourth sample vision statement above as a model.)

6. Share with the large group the vision statement that you have written. Work together with the large group to make sure that your wording is clear and communicates your thoughts exactly. Take note of comments shared, and write the final vision statement here.

7. What are the biblical texts that support this vision?

8. Fine-tune the vision statement so that it is clear and simple. How can you communicate this vision to the congregation and invite it to adopt the vision as its own? What will the congregation need to understand and believe in order to support this vision? How can you help the congregation do this?

WORKSHEET 2

MISSION:

How to Create a Mission Statement

REVIEW

The VISION STATEMENT is a clear and concise description of what you believe God wants your congregation to be. The VISION is about WHO THE CONGREGATION IS.

NEW CONCEPT

The MISSION STATEMENT summarizes HOW the church is going to MAKE THE VISION A REALITY. It tells the actions that will bring about the vision. The MISSION STATEMENT is about ACTION.

TWO EXAMPLES OF A MISSION STATEMENT:

1. *The mission of Living Water Church is to live out the gospel of Jesus Christ through the worship of the Triune God, the preaching of the Word, service to our neighbors, the discipleship of believers from children to adults, and the fellowship of the family of God.*
2. *At New Life Community Church we will be the light of Christ through:*
 - *Worshipping the true God in Spirit and in Truth (John 4:24)*
 - *Preaching the Word of God with clarity inside and outside the church (Matthew 28:18-20)*
 - *Serving our neighbors and our family, the marginalized, and the forgotten in our community with the love of Christ (Mark 12:31)*
 - *Growing in faith and helping others to grow (II Peter 3:18)*
 - *Serving our brothers and sisters in Christ with the love of Christ (Romans 12:10, 13)*

ACTIVITIES

1. Based on the sample mission statements above, what are these congregations going to do?

2. Write your congregation's vision statement below (what you wrote on Worksheet 1). If your congregation does not have a vision statement, return to the previous worksheet and develop one.

3. Whom does your church want to reach?

4. How will your congregation achieve its vision for reaching these people? What are you going to do to make it a reality? Make a list of concrete actions:

We recommend that each mission statement include the five vital functions of the church:

- Preaching and evangelism
- Education and discipleship
- Service
- Fellowship
- Worship

5. The mission statement should tell how the vision will be achieved. Make sure that doing the actions in the mission statement will bring about (by God's power!) the vision. Fine-tune your mission statement and write it here.

6. What biblical texts support the activities listed in your mission statement?

7. Share your vision and mission statements (including their biblical basis) with your congregation. You may want to have the pastor preach a series of sermons on the five vital functions (tasks) of the church to prepare the congregation to understand and embrace its mission. When you present the vision and mission statements, ask whether the members agree with them and are ready to support them. Invite members to commit themselves to work together to carry them out.

If the congregation does not agree with the vision and mission as defined by the leaders, it will be very difficult to carry out the ministries and the changes necessary to achieve the vision through the mission. Congregations must work to achieve consensus on the vision and mission before implementing any significant changes.

WORKSHEET 3

STATEMENT OF CORE VALUES:

How to Create a Statement of Core Values

CONCEPT

The STATEMENT OF CORE VALUES is a clear and simple list stating the most important character qualities that lead to how a congregation will act as members of God's family. The values are the principles that guide the members as they live together and make decisions as a church.

To distinguish among the VISION, MISSION, and CORE VALUES of your congregation:

- The VISION describes what God wants you to BE.
- The MISSION describes what God wants you to DO.
- The CORE VALUES describe HOW YOU WILL BEHAVE as you carry out the MISSION to achieve the VISION.

Examples of a Statement of Core Values:

1. Core Values of Rock of Salvation Church (expressed in action words)

As the people of God, we commit ourselves to:

- Be conformed to the image of Christ as individuals and as a congregation (Romans 8:29; 2 Corinthians 3:18).
- Speak the truth with love (Ephesians 4:15, 25, 29), in correction and exhortation, and with transparency in regard to decisions and financial matters.
- Serve one another in love, identifying everyone's gifts and giving them the opportunity to use their gifts (Romans 12:1-8; 1 Peter 4:10-11) and discipling people of every age and ability (Deuteronomy 6:20 & 11:18-21; Matthew 20:18-20).

2. Core Values of Living Water Church (expressed in nouns and action words)

As a community of Christians, we value:

- Clear and relevant preaching of the Word of God (Matthew 28:18-20; 2 Timothy 4:2)
- Worship focused on the Triune God and not on our preferences (Deuteronomy 5:6-10)
- Service to the needy inside and outside of the congregation (Mark 12:31; Ephesians 5:1-2)
- Discipleship for people from childhood to old age (Matthew 28:18-20; Deuteronomy 6:20 & 11:18-21)
- Knowing and caring for our brothers and sisters in Christ (Ephesians 4:2, 25-32)
- Servant-leadership and members that use their gifts (Matthew 20:25-28; 1 Peter 4:10-11)
- Responsible stewardship of resources (Psalm 24:1)

Notes:

1. Normally the Statement of Core Values includes 5–7 values.
2. Often the activities mentioned in the core values statement have been mentioned in the mission statement. The difference is that in the core values statement, these activities are shown to result from specific character qualities. For example, the core values of Living Water Church mention not just “worship” but the type of worship that is important: worship focused on God and not on human preferences, which demonstrates a righteous character. The core values serve as foundational expectations of the congregation that the leaders will take into account when making decisions, evaluating leaders, ministering to members, etc.
3. All the core values should have a biblical basis. The values must be supported by scriptural texts or a principle taught in scripture.

ACTIVITIES

1. Divide the participants into groups of three or four people. In each group:
 - Read your VISION and MISSION again.
 - Read over the two examples of core values. They may provide guidance as you think about core values for your congregation.
 - Identify the important, biblically supported values that reflect how you want to act as a congregation. (In your church's cultural context, values other than those of the example statements above might need to be emphasized.)
 - Choose 5–7 essential values that communicate how your congregation and its leaders should act in the upcoming years. There are many values that can be identified—you need to choose the most important ones for your congregation right now, those that will guide and support your VISION and MISSION.
2. Ask each group to present its list of core values. Identify the biblical basis for each value.
3. Together identify the 5–7 core values that communicate how God wants your congregation to act during the next three to five years.
4. Present the list of core values to your congregation along with their biblical basis, explaining why you chose each particular value. Ask members for comments and ideas. Revise the list of values if necessary, but always be sure to base the core values on the Word of God.
5. Provide an opportunity (for example, a special commitment service) for all the members of the church to commit themselves to living according to these core values. Then, encourage each ministry to identify which values they are already living by and which ones require commitment to achieve. Ask each ministry to work toward a specific goal related to the core values.

Statement of Core Values (final version):

WORKSHEET 4

STATEMENT OF FAITH:

How to Create a Statement of Faith

CONCEPT

The STATEMENT OF FAITH is a summary of the essential teachings of a congregation, denomination, or organization. It communicates clearly and concisely what the church believes.

Note:

If your congregation is part of a denomination or has ties to another church, we recommend you use the statement of faith of that denomination or church.

If you wish to write a statement of faith specific to your congregation, the instructions below will lead you through the process.

ACTIVITIES

1. Divide the participants into groups of 3–4 people. Assign each group one or two of the following questions. Try to answer the questions with the clearest, most concise, and most important information. The goal is to identify the most important beliefs, not to tell everything the Bible says about each topic. The statement of faith should fit on a single page.
 - a. What does your church believe about God?
 - b. What does your church believe about God the Father?
 - c. What does your church believe about God the Son?
 - d. What does your church believe about God the Holy Spirit?
 - e. What does your church believe about the Bible?
 - f. What does your church believe about the world (its created state, the presence of evil, and what is needed for people and creation to be restored)?
 - g. What does your church believe about the Church (the community of God's people of all times and places)?
 - h. What does your church believe about the future?

2. Share your answers. Try to be as clear and specific as possible. Add biblical texts to support what you believe as a church.

We recommend that you compare what you have written with the Apostles' Creed (a summary of the Christian faith used since the first centuries after Christ) or a statement of faith from a particular denomination.

It may be better for a member of the congregation with a gift for writing to take the list of doctrines/beliefs that the group has elaborated and write a draft using clear and concise language. Then, the group can revise the draft to produce the version that will be presented to the congregation. It is strongly recommended that the statement of faith fit on a single page, since this should be a concise and convenient document that can be easily shared and understood.

3. Read your vision and mission statements again to confirm that the mission (action) is created to achieve the vision. Read your core values statement again to confirm that it communicates the most important guiding principles in living out the mission to attain the vision. Make sure that vision and mission, guided by core values, are also supported by what you say about your church's faith in its Statement of Faith.
4. Share this Statement of Faith with the members of your church and listen to their comments and ideas. Was anything accidentally left out? Is there something that could be better summarized? Then write the final version and communicate it to the congregation.

Statement of Faith (final version):

QUANTITATIVE ASSIGNMENTS

Description

The last six Strategic Planning Worksheets facilitate the use of the Planning Form. Included in its use are instructions for choosing and implementing change. Help in scheduling activities, establishing a budget, choosing leaders, and evaluating projects make this portion of the strategic plan practical. Previous efforts in Worksheets 1 through 4 provide an excellent, biblical foundation to clarify and carry out the day-to-day and long term work of the church.

Worksheets 5-10 describe how to use the Planning Form as a tool to manage the process of making changes in your congregation. The Planning Form is found at the end of Worksheet 5.

WORKSHEET 5

CHANGES NEEDED:**How to Identify the Changes You Need to Make****CONCEPT**

You can identify changes you need to make by looking at the results of the exercise "Take Your Church's Pulse," in which several aspects of the church are analyzed to help leaders identify more clearly their congregation's strengths and weaknesses.

ACTIVITIES

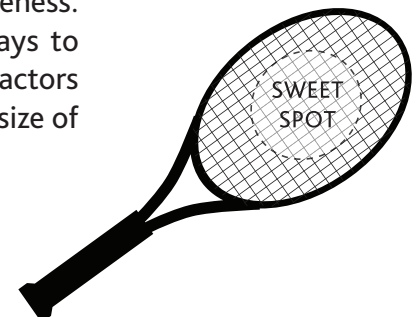
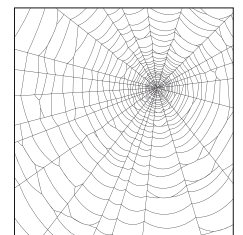
1. After having leaders complete the Take Your Church's Pulse questionnaires individually and filling out the tabulation sheet for your leaders as a group, compare the leaders' results with those from the congregation. We recommend that you tabulate the leaders' answers separately from those of the congregation to know whether their assessments of the church are different and, if so, where they differ. Record differences here:

2. Identify for each group (leaders and members):
 - a. Which two vital characteristics have the highest average score?
 - b. Which two vital characteristics have the lowest average score?
 - c. Which two vital functions have the highest average score?
 - d. Which two vital functions have the lowest average score?
 - e. Which four particular questions on the chart have the highest numbers?
 - f. Which four particular questions on the chart have the lowest numbers?
 - g. Is there a difference between the results of the leaders and those of the members?
 - h. What observations do you have regarding the results of the survey?

Record observations here:

3. Now that you have the results of your survey, there are four valid strategies for selecting priorities for your goals:

- The Barrel and Staves** – A barrel is constructed of multiple staves. If you try to fill a barrel with water, it will fill only to the lowest staff. At that point, instead of climbing any higher, the water will run out. Our weaknesses can create back doors to our churches, causing existing members to exit as quickly as new members enter. If that is the case, often the quickest path to growth is addressing our weaknesses in order to retain the people we have.
- Leading with Your Gifts** – Just as individual members have spiritual gifts, so too do congregations have particular strengths. Rather than trying to become someone else's ideal congregation, focus on being the congregation God intended you to be by identifying your unique gifts and putting them to work. Often our fully exploited strengths are more valuable to the Kingdom of God than our marginally improved weaknesses. Plus, it is often easier to move a strength by 2 points than it is to move a weakness 1 point.
- The Tennis Racquet** – The Spider-web graph often reminds people of the face of a tennis racquet. With most sport equipment, from baseball bats to golf clubs to a soccer player's foot, there is a "sweet spot," which, when making contact with the ball, gives you both the most power and the most control. With a tennis racquet, if you expand the size of the racquet face, you increase your sweet spot. Your spider-web graph shows the sweet spot of your church, the size of your ministry effectiveness. Instead of worrying about strengths or weaknesses, look for ways to maximize your sweet spot. If you could move one or two of your factors 1 point further out on the scale, which factors would increase the size of your sweet spot most quickly?



- **The Snowball Approach** – When a little snowball begins rolling down the mountain, it collects more and more snow on its outer surface. As it rolls, it grows in size, in speed, in weight and in power until it is mowing down the trees in its path. The secret is in starting small and building momentum as you go. If your congregation has little positive momentum at present, often it is most helpful to choose small obtainable goals where you can get an “easy win.” This will build confidence to tackle more challenging goals in the future.

How to choose

In short, it is simply a matter of prayer and of knowing your congregation. Some items to consider are the following:

- If, as you look at your survey results, you see weaknesses that are crippling your ministry and will prevent your gifts from ever reaching their full potential, that may be your place to begin. To utilize the barrel and staves approach, use your survey results to identify two weaknesses that are holding you back from your full potential.
- If you have a strong, clear sense of vision and giftedness, playing to your strengths is a good choice, though you may wish to tackle one weaker area as a secondary goal to strengthen your ministry platform. To lead with your gifts, use your survey results to identify two strengths to build on.
- The tennis racquet approach is always healthy as it will constantly be challenging you to broaden your ministry in new directions. If you can't decide between the approaches, it is a safe place to start. Simply look at your Spider-web graph to determine which two areas will add the most to your sweet spot. Then look at the results to individual questions within those areas for two places that will make the most difference.
- The snowball approach is particularly helpful to ministries who have experienced a setback, a blow to their morale, or who have been plateaued for a long while. Momentum is a powerful tool. Use it to make your ministry more effective for the Kingdom. After reviewing your survey results, in what one or two areas could your church get a quick and easy win.

4. Gather in a small group and share your thoughts on the following questions:

- Which approach best fits our congregation?

- Which of the vital elements and vital functions should we focus on first? Pick two.

- For the first: The change we want to see in the next three (weeks, months, years) in this area is...

- For the second: The change we want to see in the next three (weeks, months, years) in this area is...

Note: The changes you want to see should be clear, and specific, and in line with what Scripture teaches. Read over the changes that you identified to see if this is the case.

5. In the large group, share your ideas and the reasons for them. You may end up with several sets of great goals. Decide together which of them should have priority, based on a combination of which would have the most impact and which would be the most easily accomplished. Try to narrow the list to two. If you absolutely must have three, agree on which are primary and which are secondary.

AREA: **VISION / Sample Planning Form With Measurable Indicators**

| ACTIVITIES/PROGRAMS | CALENDAR | | | TOTAL BUDGET | COORDINATOR | EVALUATION OF ACTIVITY/PROGRAM: WHEN—WHO—HOW? | CHANGE ANTICIPATED IN THIS AREA |
|--|--|----------------|------|--------------|-------------|--|--|
| | MONTH | DAY | YEAR | | | | |
| 1. The leaders will hold a retreat to create a clear vision to reach the community. | 11 | 14 | 2012 | \$100.00 USD | | At the end of the event, all the participants will fill out an evaluation sheet. | Our church will understand what God wants us to be and do as the Body of Christ in our present location. |
| 2. The pastor will give a series of 3 sermons on the biblical basis of the vision that the leaders will present to the congregation. | 11 11 12 | 22 29 06 | 2012 | | | In their next meeting, the leaders will discuss whether the sermons were clear and well-received. | Indicator: How are you going to know that you have achieved this change? All of the church's 10 ministries will have identified how they carry out the congregation's vision. |
| 3. The leaders will present this vision to the congregation and ask for their comments and commitment. | After the worship service | | | | | Two days after the service, three leaders will each ask two members if the presentation was clear. | |
| 4. The pastor and the leaders will communicate the vision to the leaders of each ministry and come up with ideas for how their ministry serves/can serve the vision. | 12 | 06 | 2012 | | | After each ministry's meeting, the leader of the ministry will let the consistory know how the meeting went. | |
| 5. Each ministry will communicate to the congregation how the ministry supports the congregation in achieving the vision. | Music: 12/8/12 Education: 1/8/13 Building: 3/8/13 Evangelism: 4/8/13 Benevolence: 5/8/13 | | | | | Church leaders will visit the Adult Sunday School class in May and November 2013 to ask the members if they can identify how the distinct ministries support the congregation in achieving the vision. | When/How: Each month a ministry will communicate this to the congregation during the worship service. Coordinator: Secretary of the consistory Evaluation: Consistory will discuss how each ministry communicated with the congregation. |
| 6. | | | | | | | |
| 7. | | | | | | | |
| 8. | | | | | | | |
| 9. | | | | | | | |
| 10. | | | | | | | |

WORKSHEET 6

ACTIVITIES AND INDICATORS: Choosing Activities That Lead to Change

INSTRUCTIONS

In Worksheet 5, you identified two general changes that you desire to implement in your congregation during the next three years, one a vital element and the other a vital function of the church.

ACTIVITIES

1. Write down the first change you've identified:

Remember that this change should be clear, specific, and supported by God's Word.

2. Respond to the following questions:

- a. How (what actions will we take) will we achieve this change?

- b. What specific activities will we undertake? Come up with several tasks and list them in logical order (what needs to happen first, second, third, etc). Please refer to the Action Planning Guide following Worksheet 6. This aid to planning change activities can be used over and over again. It can be used to plan short term and long term changes/projects.

- c. Upon achieving this change, what will we see? What will be the sign that indicates that we have achieved the desired change?

QUANTITATIVE INDICATORS:

Below you will find some examples of quantitative indicators. These are always measurable (meaning that a number is used to evaluate them).

Choose the best indicator for measuring each anticipated change—an indicator that shows whether the change or the goal was met, one that can be measured easily. Do not choose an indicator that cannot be measured.

Write the indicators in the same column in which you wrote the overall change you are seeking.

Example:

In *Take Your Church's Pulse*, the leaders and members of Life Abundant Church gave a low mark in the first area: CLEAR AND INSPIRING VISION.

Anticipated Change:

Members of Life Abundant Church will effectively express what they believe God wants their church to be and to do as the Body of Christ.

How will they achieve this change?

- They will commit to the process of creating and/or revising a vision statement.
- By November 29, 2013 (date just as an example), all of the church's ten ministries will communicate to the church how they are carrying out the vision.

Activities that need to happen so that Life Abundant Church understands "what we believe God wants us to be and do as the Body of Christ":

1. The leaders will have a retreat to design a clear vision to reach the community.
2. The pastor will give a series of three sermons on the biblical bases of the vision.
3. The leaders will present this vision to the congregation, ask for their comments, and ask members to commit to carrying it out.
4. The pastor and the leaders will communicate this vision to the leadership of the church and will ask them to identify how specific ministries presently serve and can better serve the vision.
5. Each month, a leader of one of the ten ministries of the church will communicate how the ministry supports the congregation in achieving the vision.

Indicator that they have achieved this change:

All of the church's ten ministries will have identified how they carry out the congregation's vision.

Evaluation:

How many of the ten ministries have identified how they carry out the congregation's vision? This number, or indicator, will help the church know how they need to continue to work to achieve the desired change.

On the Planning Form (attached), fill in these boxes:

- **AREA:** Write down the area on which you are working.
- **ACTIVITIES/PROGRAMS:** List the activities that your church is going to carry out to achieve the change. Put the activities on the Planning Form in chronological and logical order.
- **CHANGE ANTICIPATED IN THIS AREA:** At the top of the column write the change you have decided to pursue, and below that list the key indicator(s) that will be the measurable sign(s) that you have achieved that change.

Worksheets 7–10 will help you fill out the other columns of the Planning Form.

After filling in all the columns on the sheet for your church's first anticipated change, return to the beginning of this worksheet and repeat the process for the second change that you identified, using a second Planning Form.

ACTION PLANNING GUIDE:

Write your desired outcome or change here: _____

Steps to reach it:

5. _____

4. _____

3. _____

2. _____

1. _____

Write your present day reality here: _____

Write your outcome at the top. Write your present day reality at the bottom. Write the first one or two steps/actions you know you need to take towards the outcome. At step #5, write what needs to be in place or happening immediately before the desired outcome is reached. Work backwards. What should step #4 be—in order to reach #5? As you work from the bottom up and from the top down, fill in the middle steps. This process helps you to think about all steps/actions involved to accomplish your outcome.

EXAMPLE OF INDICATORS:

- The number of new believers in the past year.
- The number of new small groups we began in the past year.
- The percentage of financial giving in the past year.
- The number of people who discovered their spiritual gift in our congregation.

WORKSHEET 7

CALENDAR:

How to Schedule the Activities

INSTRUCTIONS

In the previous worksheets, you filled out the following parts of the Planning Form:

- Area
- Anticipated Change
- Activities/Programs
- Indicators

Now we will schedule the activities that you are going to carry out. On the Planning Form (attached), fill in these columns:

CALENDAR (MONTH/DAY/YEAR):

For each activity, tell when you are going carry out that activity.

If it is an activity that you are going to do in several steps, write down the different dates on which you are going to do each step. Be realistic about when you can do the activities. If you cannot identify an exact date, tell how soon the activity should follow the previous activity (a week later, a month later, etc.).

WORKSHEET 8

BUDGET:

How to Create a Budget

INSTRUCTIONS

After you have identified the necessary changes (the broad change you desire), the activities that you are going to carry out to achieve the changes, and the indicators of success (how you will know you have achieved the change), it is important to make a budget so that you can anticipate the costs and manage your resources well as you implement the plan.

For Activities:

Identify approximately how much it will cost to carry out the activities included in the plan. Be specific and include all the necessary elements.

Types of costs:

- Rental of the location
- Sound equipment rental
- Office supplies
- Decorations
- Photocopies
- Food/refreshments
- Teaching materials
- Transportation

For each activity, make a chart like this one:

| ACTIVITY: | |
|------------------------|-------|
| DATE: | |
| DESCRIPTION OF EXPENSE | COST: |
| | |
| | |
| | |
| | |
| TOTAL: | |

This will be the detailed budget for the activity. On the Planning Form, write the total of the budget in the indicated column.

If you do not know what certain things will cost, ask for quotes. For the most expensive items, ask for several different quotes to find the best price.

The budget allows us to anticipate the expenses before the activity takes place, and it forces us to think about these questions:

- What financial resources do we have for these activities?
- How are we going to obtain the necessary funds to be able to carry out these activities?
- If we don't have the funds now, what is the anticipated time line for obtaining the funds?

The budget also helps us during the activity to monitor costs and not spend too much. If an item costs more than was anticipated, the amounts for other items will need to be cut to maintain the same total cost in the budget.

Finally, the budget can help us in the future, because it gives us an idea of how much things cost in the past. Keep the figures of anticipated costs and actual costs to help you make budgets in the future.

For your church:

If your church does not have an overall budget, leaders should create one. It is important to make one every year. You can follow these steps to make a budget for all the expenses of the congregation.

- a. Divide the typical yearly expenses into categories appropriate for your congregation, such as these:
 - Worship services
 - Christian education/discipleship
 - Evangelism
 - Salaries
 - Rent for location
 - Outreach to the community
 - Benevolence fund
- b. Identify the typical expenses for each category in every month.
- c. Communicate the budget clearly and simply to the members of the congregation and give a financial report each month or quarter. Explain to the congregation all important decisions regarding the budget.
- d. Teach the congregation about the stewardship of financial resources (tithing, offerings, family budgets, etc.). Make sure to support your stewardship teaching with biblical principles, including scripture references.

WORKSHEET 9

COORDINATORS:

How to Name Coordinators

INSTRUCTIONS

In the previous worksheets you filled out the following parts of the Planning Form:

- Area
- Anticipated Change
- Activities
- Indicator(s)
- Calendar
- Budget

In this worksheet you will name a coordinator for each activity. This person is not going to do everything for the activity, but rather will coordinate the work of EVERYONE to carry out the activity.

The coordinator...

- ...will delegate the different tasks to prepare the activity.
- ...will make sure that everyone is completing his/her tasks.
- ...will make sure that the activity is going smoothly.
- ...will make sure that the evaluation of the activity is done as planned.
- ...will give a report to church leaders about the activity.

In choosing each coordinator, we recommend the following:

1. Choose a leader that understands how this activity fits into the strategic planning process. The activity is not just for the sake of doing something: it's related to achieving a specific change in the congregation.
2. Choose a person known to be a mature Christian in the congregation and/or community.
3. Allow the coordinator to guide decisions, with input from church leaders, about who assists with the activity.
4. Remind the coordinator that he or she is not to do everything but rather to coordinate the work and encourage the work of others to carry out the activity.

WORKSHEET 10

EVALUATION:

How to Evaluate the Activities

INSTRUCTIONS

Each activity should be evaluated to make sure you are moving toward the overall change you are seeking.

There are several options for evaluating an activity:

- a. Make a questionnaire for the end of the event or process.
- b. Interview or talk with certain members/participants.
- c. Make observations about whether the activity was successful or not, and why.
- d. Submit written reports that address specific questions.
- e. Collect data (number of participants, amount of money collected, how long it took to complete the activity, number of people who responded, etc.).

Choose an evaluation that is appropriate for the type of activity.

To decide how to evaluate an activity:

1. The goal of the evaluation is to discover:
What worked or went well? Why?
What did not go well? Why?
Based on the answers to the above questions, what should we do?
2. For each activity and indicator, answer the following three questions in the Evaluation column of the Planning Form.
When should the activity or indicator be evaluated?
Who is going to carry out the evaluation?
What is the best way to evaluate the activity/indicator?

CONCLUSION: A Final Note

After going through these 10 steps of strategic planning, review your entire plan to make sure that the activities that you have identified will indeed guide you to achieve the changes your church needs to make.

You have invested significant time, prayer and effort in thinking and planning for the best future possible for your church. Remember that this strategic plan is for you to use every day. It is dynamic, which means it can be revised and expanded to accommodate needed changes. Allow this Holy Spirit led document to be a useful tool for your church. Bathe this process in prayer!

Now you are ready to implement the plan. May God bless your church!

AREA:

| ACTIVITIES/PROGRAMS | CALENDAR | | | TOTAL BUDGET | COORDINATOR | EVALUATION OF ACTIVITY/PROGRAM: WHEN—WHO—HOW? | CHANGE ANTICIPATED IN THIS AREA |
|---------------------|----------|-----|------|--------------|-------------|---|---------------------------------|
| | MONTH | DAY | YEAR | | | | |
| 1. | | | | | | | |
| 2. | | | | | | | |
| 3. | | | | | | | |
| 4. | | | | | | | |
| 5. | | | | | | | |
| 6. | | | | | | | |
| 7. | | | | | | | |
| 8. | | | | | | | |
| 9. | | | | | | | |
| 10. | | | | | | | |