



TRANSFORMING

CHURCH

# Immanuel Lutheran Church Strategic Plan 2008

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Developed by Congregational Leadership



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## Section One: The Strategic Plan

### Assessment Summary

As a starting point, our church went through a process of reviewing our context through a comprehensive assessment process that included a congregational survey (The Transforming Church Index), a study of our local community, and a series of focus groups within our congregation. The following are the key strengths and issues that TAG Consulting identified for our planning process based on information collected.

#### Strengths

- Atmosphere: Warm, friendly, accepting (grace)
- Home groups
- Authenticity (real)
- Spiritual events (Alpha, 40 days, Kingdom weekends, etc.)
- Local missions (Freezing Nights, Phoenix housing, etc.)
- Preschool
- Youth group (for those who are in it)
- Preaching is real and down to earth

#### Key Issues

- Lack of a strong spiritual foundation (discipleship and Adult Ed)
- Confusion, dissension, and disinterest regarding Avenue of Hope
- Lack of fellowship/three services
- Volunteer base: lack of support for staff and programming
- Small number of small groups
- No clear process for dealing with issues (ineffective board/staff interactions)

TAG also shared the key elements for building a strong foundation as a church, using the AWESOME acronym:

- **A**ssimilation of people into community
- **W**orship that connects the heart and mind to each other and God
- **E**quipping people to become mature followers of Jesus
- **S**ervice to those in need
- **O**utreach to our backyard and beyond
- **M**inistering to dependent generations
- **E**ngaging the issues in our culture

## **Our Core Values**

Core values are the commitments that drive a church day to day. They are not our core beliefs. Core beliefs are described in our theological documents and doctrinal statements. Core values are also not the same as our “aspired” values – values that we believe we should be cultivating, but are not yet rooted in our culture. Core values are present within our culture, and describe our personality as a church. They are like our genetic code, or DNA. Core values tell the members of our church how we make decisions, how we handle conflict, and what every leader (lay and professional) must be committed to. Values determine who is on the leadership team, and who is not. While values don’t necessarily tell us what we do (that’s the place for a mission statement), they define the manner in which we operate. They define our posture. They are like the walls of a canyon -- everything within those walls is fair game, but we dare not go outside those walls. Most importantly, they describe the values that we expect to see lived out in the lives of our leaders. The following are our core values:

- **People matter**
- **Walking through life together**
- **Experiencing God’s transformation**
- **Seizing opportunities to serve others**

The core values above are congruent with ILC. However, they have not been articulated or reinforced very well in the last three years. The church needs to celebrate these on a regular basis, and use them as a filter for identifying and developing leaders.

## **Our Mission**

Mission is simply the core purpose of any organization. It describes why the organization exists. It is not vague or overarching; it is precise and focused, memorable and short. The noted management guru Peter Drucker once said that an organization’s mission statement should fit easily on the front of a T-shirt. We might take that a bit further and say that a truly stellar mission statement should be no more than one sentence long.

A mission statement tells us what we do. But it also tells us what we don’t do. In a sense, we are “trustees”, managing a trust on behalf of beneficiaries. A strong mission statement identifies the specific beneficiaries, the result that we hope to accomplish, and the purpose for which we exist. Too often, church mission statements are overly broad. They lack definition. While our values define our posture to the world, our mission tells us that we can’t be all things to all people. It gives us focus. The following mission statement has been adopted by our church’s leadership:

**Sharing God’s Hope, we will do whatever it takes to help lost people become fully devoted followers of Jesus Christ.**

## Our Strategic Objectives

Strategic objectives focus our efforts for a period of time (often 3-10 years). Strategy is a reflection of the changing context in which our church operates. Strategy answers the question of how we will fulfill our mission in the medium-term future in light of changes to our context. It tells us how we will move toward our envisioned future. It is not intended to be enduring. It tells us how we will allocate our resources and what our areas of focus will be. Typically, a church can focus on about 3-4 strategies during any given 3-10 year period. In order to fulfill our mission, reach our vision, and live out our values in our context, leadership will focus on the following strategic objectives over the next several years. They will need to be thought through and planned out. The following is the result of group brainstorming, but does not represent specific plans at this point.

### Spiritual Growth (listing of all groups brainstorming on this area):

How to engage people and increase their on-going spiritual growth?

- Focus on outreach has impacted on spiritual growth efforts
- How and where to direct attention
- Who are the "Shepherds?"
- What contexts are critical?
- What resources are needed?
- "Community" Support

What? - Determine needs and focal points (eg. Childrens' Ministries)

- Define "right" resources
- Direct resources to the "right" place

Who? - "TBD" (Leaders of focus groups and small groups?)

How? - "Survey Monkey"

- Small group discussions
- Focus group discussions

When/Where? - TBD

Why aren't we growing?

### Vision

Go from 45 minutes to fully devoted.

### Plan

Redefine Budget

Create opportunities

Examples:

Sunday School Hour

Small Groups (to be determined)

Service

Support Groups

Wednesday Opportunities

Testimonies

Staff & Leaders will provide training and growth opportunities.

“What do we need to do to make you come back?” (and bring others with you.)

A. What does it look like?

1. Growth in Small groups
2. How we treat each other
3. Outward display of the Fruits of the Sprit (love, joy, peace, patience, kindness, goodness, faithfulness, gentleness, and self-control)
4. Evidence of discipleship
  - Sharing
  - Inviting
  - Music/worship
  - Commitment/volunteer
  - Tithing
  - Understanding your role
  - Prayer
5. Community on a journey
6. Healthy attendance at worship
7. Study of God’s word
8. Realize it’s a journey – we’re never done.

B. What are the planning thoughts?

1. Talk about competing values
2. Process
3. Provide opportunities for growth, studies, leadership
4. Model it- The tool set
5. Preaching/teaching
6. Safe place for people to share their faith

### **Assimilation of People - Transforming**

A. What does it look like?

1. Every partner is involved in some identifiable ministry.

**B. What are the planning thoughts?**

1. How do we identify, educate, and utilize spiritual gifts. (40 Days of Purpose, Spiritual Gift Inventories.)
2. Staff to support
3. Increase active small groups
4. Identify and are living the mission
5. What are the criteria to be a ministry? (leader (non-staff), a plan, tie to mission)
6. Readdress the service structure

**OUTREACH...**

Are we aligned with mission and strategy?

- Are we satisfied with efforts? (Avenue of Hope & Youth Ministries)
- Do members know what these efforts are?
- What to start, stop or change (keep)?
- Phoenix Housing and Freezing Nights ☺

What?- Determine critical focal points and resources  
Education/Training

**STAR ALIGNMENT...**

What structure and process (and people) will work for us ? (ILC Leadership)

- Constitution/By-Laws
- Strategic match/
- Power issues (“DNA”) and perceptions/assumptions
- “Consumerism”
- Expectations/Definition of Roles (Staff/Lay/Volunteers)

[ Order of action (#’s) – 1,2,3,etc. ]

- What?- 1) Specific roles defined (expectations/authority)
- 2) Strategic match (do the roles fit?)



- 3) By-law revision

Who? - Staff/Lay/Volunteers (other)

How? - Initial drafts/revisions

- Input/review discussions

- Final drafts

- BOD approval

- Initial by-law drafts

- Input/review discussions

- Final draft

- BOD approval (“Agreement to live by”)

[ Communication is critical through all above steps]

When? - TBD (“Tomorrow we start”)

(Where?)

A. What does it look like?

1. A system we agree upon and understand.

2. Understand when it is operational vs. strategic or transforming – setting the parameters.

### **Avenue of Hope**

What was the vision?

To create a third place

Is this still the vision?

If so, is Avenue of Hope the way to do it?

What ministries can we do now to enhance Avenue of Hope?

Surveys on line

Tic into core values

Outreach team as part

### **Worship Services**

Strategic

Teaching Hour

Type of Services

Slow change

## **Section Two: Our Process**

### **TAG Consulting: The Consulting Firm**

TAG Consulting is a management consulting firm located in Fairfax, VA – a suburb of Washington, DC. TAG Consulting's expertise is primarily in the areas of strategic planning (including research and assessment), leadership development (executive coaching, board development, staff development), and organizational development (teambuilding, conflict resolution, organizational structures). TAG Consulting has consulted with some of the nation's largest employers and organizations. Their clients include the US Army (Office of the Chief of Staff), the Federal Aviation Administration, Kaiser Permanente, Merrill Lynch, The Good Guys, and the Salvation Army. In addition, the firm has worked with hundreds of non-profit organizations, associations, and churches. TAG Consulting also provides all of the coaching and consulting services for the Transforming Church Institute, a non-profit organization that provides ongoing peer support and professional coaching for pastors across the nation.

### **The Process**

This project involved two primary phases for our church: an assessment phase and a planning phase. During the assessment phase, our church participated in the Transforming Church Index – a congregational survey. Our church was compared to national norms on five key indicators (subdivided into 15 scales). We received a detailed report following that study. After the survey, a TAG consultant facilitated an onsite assessment which consisted primarily of focus groups and interviews with key constituencies within our church. These focus groups included newcomers, long-term members, lay leaders, and paid staff. Following the assessment, TAG Consulting sent us a comprehensive report that summarized our strengths and weaknesses as a congregation, along with a series of key issues that were identified.

The second phase of the process involved strategic planning. Our lay and staff leadership gathered together for a period of time to develop our core values, mission, and strategic objectives. The planning process is ongoing. We will continue to involve our congregation in the further development of our key initiatives. This report is designed to give an overview of the key components that emerged during this process.

### **Introduction to Strategic Planning**

Church ministry is intense and time-consuming, both for pastors and volunteer leaders. It often takes everything we have just to keep up with the routine – preaching, visiting, counseling, leading volunteers, taking responsibility for ministry and programs. Every now and then at a conference we will hear fragments of phrases like 'long-range planning', 'vision', 'strategic planning', and we think 'That stuff is great for big churches with lots of staff but I am neck deep and treading water just keeping up with the day to day'.

The fact is that thoughtful planning - **strategic** planning – helps us in the areas where we are most burdened – time management, priorities, responsibilities, leadership challenges. This strategic plan may well be the most crucial step in maximizing the effectiveness of our ministry.

The most important thing to know about strategic planning is that it is a **process**, not a project or a product. There is often more value in the process itself than in the end result.

And the process never ends. Strategic planning is an often-renewable exchange of information, ideas, dreams, hopes and vision that will keep our church sharp, passionate, and focused.

Strategic planning helps us understand the current state of our church, helps us determine what our church is called to be, and provides tangible and immediate action steps for the next part of your journey.

Please don't confuse strategic planning with "master-planning". Master planning is typically associated with facility and site development. While strategic planning may touch on these items, it also includes a lot more, and is much more focused on action, specifically on strategic initiatives that emerge from the planning process.

It is a process that involves lots of hard work and thought, as well as the engagement of church leaders, both lay and professional. And it is perhaps the single most important thing we can do to insure the unity, focus, and effectiveness of our church. We have intentionally gathered us much data as possible from our congregation.

Doing ministry without strategic planning is much like camping in the wilderness without a map or compass. We can accomplish a lot of urgent things where we are – providing shelter, searching for wood, starting a fire, preparing food. But once we get ready to break camp, we have no idea where to head next. The business of the urgent is important and fulfilling until we look up and realize that we are not quite sure why we are working so hard and where we want to go next.

Strategic planning provides both the map for the journey and the compass for clear direction. Taking time out to insure that we have these items will insure a more effective journey.

Why plan strategically?

- So that our work in the present is part of a bigger picture.
- So that both staff and volunteer leaders are united around a clear purpose and direction.
- So that the church will know what it wants to be when it grows up and has a clear understanding of what it will take to get there.
- So that our church will have the energy that comes from unity in mission, vision, values, and strategy.
- So that we will have a measure of what NOT to do and so that we will have an agreed upon standard when there are disputes about the nature and focus of our church's ministry.

Strategic planning is an investment that requires time, deep thought, confronting the facts with brutal honesty, probably some conflict, and a lot of hard work. Is it worth it? Review the bullet points just above and answer that question for yourself!

## **Section Three: Our Plans in Detail**

### **Our Key Initiatives**

Initiatives are specific ways of implementing the strategy and fulfilling our mission. They are big-picture “actions” that we will undertake over the next few years. They may represent new ministries, overhauls to existing ministries, or new ways of operating. It is best for initiatives to be focused within a 2-3 year time frame so that we can continually update and monitor our progress. The following initiatives have been identified for the near-term future:

Please fill this section in as plans are developed.

## Appendices

### Next Steps

1. Determine an annual planning process. Strategic planning should never be a one time event. Generally, the plan should be overhauled every 3 years. But it should be updated and tweaked annually. It should be monitored quarterly.
2. Edit and approve the strategic plan within the next couple of months.
3. Develop “design teams” and “focus groups” to gather input on the development of the strategic initiatives.
4. Assign responsibility for the planning process to a “champion” (internal consultant who is responsible for the process – not the plan itself).
5. Determine how often you will need an outside facilitator (generally one follow-up six months after the initial strategic plan has been developed and then once every year or two for updating the plan).

### Communicating the Plan

Communication is essential for successful execution of the plan. This is not rocket science, but it does require some artful thinking. The basic rules of communication are:

1. Give information at a rate that people can tolerate. Too much information will overwhelm people or possibly raise too much anxiety. Too little information will have a tendency to minimize anxiety, thus maintaining status quo.
2. Communicate the core elements of the plan regularly. These need to be imbedded in people’s heads. The values and mission of the church should be repeated at least monthly for leadership.
3. The best form of communication is involvement, rather than media. This means that people will get the plan if they are involved in developing it. Involve people in the design of the initiatives through design teams or focus groups. Convene regular focus groups to get specific feedback.
4. Avoid Town Halls. Open forums tend to give too much voice to the nay-sayers, while supporters typically won’t show up. Feel free to make announcements or convene public gatherings, but avoid open-ended question and answer sessions.
5. Put the plan in writing. Make it available for anyone and everyone to read.
6. Communication is often unspoken. People will know what the plan is when they see the church supporting the plan through its budget (align the budget to strategy, not to function); through its organizational structures (get rid of non-essential committees and build teams around the strategies); and staffing (make sure that you have a dedicated staff person for each strategy). These unspoken actions will communicate much more about the plan than any words could possibly communicate.

## Project Planning Basics

Project planning involves the allocation and integration of three resources: people, time, and money. Volumes have been written about project planning. In fact, the Project Management Book of Knowledge (PMBOK) contains over 1,000 pages of how to plan projects. Project planning is a valuable and important complement to strategic planning. At the same time, project planning can take on a life of its own, resulting in waste and inefficiency. Based on our experience, we recommend that project planning should be focused on bite-sized chunks – rather than entire projects. This allows for flexibility and agility in the face of changing times. In addition, this forces project planning to consistently align with the overall strategy. After all, you have to remember what you are trying to accomplish – not a series of tasks, but an overall objective!

It is often beneficial to use a software program (such as Microsoft Project) to develop project plans. But good project plans can still be developed using Excel, Word, or even flip charts. Don't get too hung up on the format. You need to choose a medium that lends itself to strong visual impact and is easy to update. In other words... flip charts may be more effective than software programs because of the visual impact.

The following is a brief guide to developing project plans.

### Project Summary

Each initiative should have a separate summary. Name the initiative, team leader, and team members. Give a brief description of the initiative, name the desired ends and the timeframe. We encourage organizations to think 24 months or less.

Initiative	July 4 <sup>th</sup> Party
Team Leader	Elton
Team Members	John, Paul, George, Ringo, and Whitney
Initiative Description	Blow out party for neighborhood
Desired Ends (deadline)	Everyone has fun on July 4 <sup>th</sup>

### Project Milestones

After you have developed the project summary, you will need to develop the milestones. Milestones are events that are absolutely necessary to reach the desired ends. Starting with the desired ends, use the following process:

1. Brainstorm all of the events, regardless of sequence, that have to occur in order to reach the desired ends.
2. Determine which of those events are absolutely necessary.
3. Place the events in a logical order.
4. Starting at the beginning, put dates next to each milestone (this forces you to be more realistic than if you start at the end and work your way backwards). If you find that your initial deadline is unreasonable, change the deadline before you get started. It is

critical to manage expectations of team members and stakeholders up front, rather than disappointing them on the back end.

### Sample Milestones: July 4<sup>th</sup> Party

Milestone	Date
Hire band	June 4 <sup>th</sup>
Send out invitations	June 10 <sup>th</sup>
Pick up fireworks	June 20 <sup>th</sup>
Pick up barbecue	July 3 <sup>rd</sup>
Party!	July 4 <sup>th</sup>

### The Action Plan

The project plan fills in the blanks between the milestones. Each milestone requires at least one task (action step) before the milestone, and one task after the milestone (at a minimum). In addition, each milestone usually should have at least one communication task. It's often helpful to number the tasks. Based on each milestone, start by brainstorming the tasks. Then sequence them and timeline them. Then determine the person responsible and the resource requirement.

#### Sample Action Plan (First two milestones): July 4<sup>th</sup> Party

**Bold denotes milestone;** *italics denotes communication task*

ID	Task	Person	Deadline	Time	Money
1	Gather list of bands	John	April 15	3 hours	\$0
2	Gather names for invitation list	Paul	April 30	2 hours	\$0
3	Purchase invitation software	George	May 15	1 hour	\$100
4	Input names into software program	Ringo	May 20	1.5 hours	\$0
5	Contact bands	Elton	May 20	1 hour	\$0
6	Review bands	Whitney	May 25	3 hours	\$0
7	<i>Team meeting at Elton's house to determine which band to hire</i>	<i>Everyone</i>	<i>May 30</i>	<i>6 hours (1 hour per person)</i>	<i>\$30 (for pizza)</i>
8	<b>Hire band</b>	<b>Elton</b>	<b>June 4<sup>th</sup></b>	<b>1 hour</b>	<b>\$500 (50% deposit)</b>
9	<i>Send out email that the band has been hired</i>	<i>Elton</i>	<i>June 4<sup>th</sup></i>	<i>1 hour</i>	<i>\$0</i>
10	Purchase invitation stationery	George	June 4 <sup>th</sup>	1 hour	\$200
11	Print invitations	George	June 8 <sup>th</sup>	1 hour	\$10 (toner)
12	<b>Stuff and mail invitations</b>	<b>Ringo</b>	<b>June 10<sup>th</sup></b>	<b>2 hours</b>	<b>\$37 (postage)</b>
13	<i>Send email that invitations have been mailed</i>	<i>Ringo</i>	<i>June 10<sup>th</sup></i>	<i>.25 hours</i>	<i>\$0</i>
14	<i>Team Review of First Two Milestones</i>	<i>Everyone</i>	<i>June 15<sup>th</sup></i>	<i>3 hours (30 minutes per person)</i>	<i>\$10 (coffee)</i>

