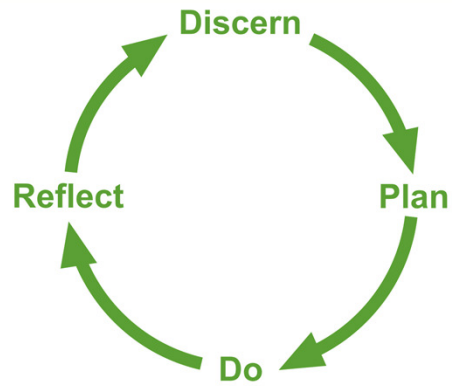


Planning for Effective Ministry: The Discern/Plan/Do/Reflect Cycle



Copyright © 2011 CREDO Institute Inc., et al. All rights reserved.

Planning for Effective Ministry

Fresh Start

Talking Points:

“You will be my witnesses in Jerusalem, Judea, Samaria, and to the ends of the earth.” (Acts 1:8) With these words, Jesus ascends into heaven leaving his church to determine how to fulfill this mandate.

Planning Is a Cyclical Process

**“Vision without action is a dream.
Action without vision is simply
passing the time.”**

Joel Barker


Planning for Effective Ministry - 2

Fresh  Start

Talking Points

Unless there is agreement on vision plans are useless – they must flow from a discernment of where the community is called. From vision arises a plan, with discrete goals – or otherwise it remains a dream. But the goals must be acted upon or the vision still remains just a dream. So there must be accountability for action embedded in the cycle. And finally, every system needs feedback – how are things going? Has the situation changed? Is the nature of our call different today than it was in the past? Are we accomplishing what we said we would accomplish? Are we doing so in ways that are healthy and Christ-filled? From the responses comes a new process of discernment, an adjustment to meet the changing call of God and neighbor.

Different Kinds of Planning



- Short-term problem-solving
- Future-oriented “next steps”
- Strategic

Planning for Effective Ministry - 3
Fresh Start

Talking Points

Planning can take a variety of forms. It may be focused around some immediate issue – we need to improve access to our building, for example. It may be more future-oriented – determining “next steps” in an already agreed-upon direction. Or it may be truly strategic, a broad-scale revisioning of the mission and ministry of a congregation. Gil Rendle and Alice Mann call this last process “frame-bending” because it can lead to an entirely different sense of mission (Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations, pages 6-14 and Resource C).

For each kind a key question is – who should be involved? Who has the expertise needed? Who will be affected? How widespread will the impact of the solution be? How limited or expansive are the options? In general, the more complex the issue under discussion and the wider the potential impact the greater the level of involvement should be.

How many of you are in congregations that have planning processes for short-term problem-solving? How many of you are in congregations that regularly engage in long-range planning? How many of you are in congregations that have a regular cycle of strategic planning? What is working well with these various types of planning?

Note: Resource C in Holy Conversations contains a handout that summarizes the three types of planning. It may be downloaded free as a handout if you own a copy of the book (which provides the links to the web site). It would make an appropriate handout at this point.

Where Is Your Congregation in the Planning Cycle?

- Are there existing goals?
Do they still fit?
- What kind of planning process was used?
- Where might you engage the process?



Planning for Effective Ministry - 4

Fresh Start

Talking Points

Refer back to the diagram in slide 1 (or draw it on a piece of flip chart paper)

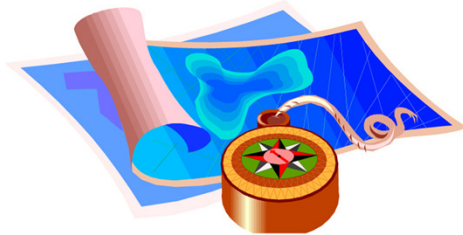
Thinking about future-oriented or strategic planning, does your congregation have such a planning process? Does it include all these four phases? The first thing to check is whether the congregation has a set of goals. If there was a Congregational Profile, the goals listed there would be a good place to start. If there was a job announcement or job description, the goals for the clergy position might have been outlined.

Where is the congregation in terms of the planning cycle now? **Place different colored dots or x's showing where each congregation is now.**

If your congregation has some goals, how were they set, who was involved and is there an implementation plan? If there are no current goals, what kind of process has your congregation used in the past? What do you think it might be time to do?

Distribute Handout 1 and give participants a few minutes to jot down their responses then discuss their observations in small groups or in a general large-group discussion. If the discussion takes place in small groups, do a large group debrief of the observations.

Planning in an Uncertain World



**“If you want to make
God laugh, show Him
your plans.”**

Old Proverb

Planning for Effective Ministry - 5

Fresh Start

Talking Points

How many of you have been part of a planning process (in a congregation or outside of one) that failed? Or that resulted in plans that simply sat on the shelf, gathering dust? What caused that to happen?

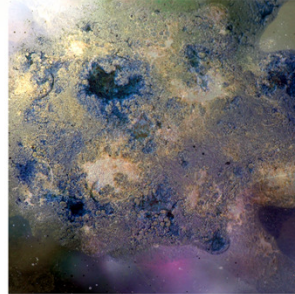
Current organizational systems theory has led many secular organizations to drop 5- and 10-year strategic plans. Such plans are too static to meet the needs of a rapidly changing environment. Successful organizations are those that are really clear on their mission. They, in management guru Tom Peter's phrase, “stick to the knitting,” not diversifying beyond their capability and remaining flexible and able to adapt to whatever happens. They realize that only in the chaos of uncertainty can change and growth occur. The same is true for the kind of healthy congregations researchers such as Diana Butler Bass are profiling.

Because being clear on your “knitting” is so critical, let's focus on strategic planning for the moment. Both short-term and “next step” planning have the same, though shortened, cycles of discern/plan/do/reflect but the content of their cycles is driven by the broader vision and mission of the congregation. If the strategic planning process is well done, the rest will follow.

Conversation and Chaos

“By far the most powerful force of attraction in organizations and in our individual lives is meaning.”

Margaret Wheatley



Planning for Effective Ministry - 6

Fresh Start

Talking Points

Congregations come together because of a shared sense of meaning and mission (or purpose). As new people enter or the context for ministry changes, that shared sense of identity may become frayed. Strategic planning is about regaining that shared sense of mission – of creating order out of chaos. It is the story of the creation – “In the beginning when God created the heavens and the earth, the earth was a formless void and darkness covered the face of the deep, while a wind from God swept over the face of the waters” (Genesis 1:1).

Creating a shared sense of identity requires conversation and story-telling. Such conversations cannot be haphazard; they need to be structured and unfold in a disciplined way. Arriving at a shared sense of mission and ministry is always about making choices. There is much in the world to which the church can and should respond, but no one congregation can do it all – what is the “bad news” that most tugs at its heart and to which it is able to respond?

These conversations will lead to disagreement, but sharing differing priorities and world-views is the only way to discern a sense of common ground of call. All too often we are not willing to sit with these disagreements until a call begins to emerge. Yet it is only from chaos that change and new life can emerge. We are not looking for consensus, which is widespread agreement, but call, a compelling purpose that leads us to respond.

Being prepared to take the time needed for that sense of call to emerge is important. Remember that the pillar of fire and cloud sometimes stopped and stayed in one place while the people of Israel pitched tent and waited for further discernment on their journey to the Promised Land. While they became a new people under a new covenant after their wilderness experience, not everyone made the whole journey – some died, some married into the tribes they met along the way.

Because life is uncertain, any plans that emerge must be flexible. Each step along the way could be viewed as incremental, while always keeping the larger vision or purpose in mind.

Participatory Process Is Essential



“People will support what they help create.”

Marvin Weisbord

Planning for Effective Ministry - 7

Fresh Start

Talking Points

People “buy into” what they create, so widespread inclusion is the hallmark of successful planning. Planning is not something that can be left to a team or to the Vestry, though there will need to be a small group that manages the process and synthesizes the data collected. The planning process should be one that positively affects relationships, understanding, group cohesiveness and interdependence.

Think about a time when you have been involved in a planning/implementation/evaluation cycle. If you think about that process, what about it fostered relationships? What about it increased understanding and a sense of teamwork for you and your colleagues? What got in the way?

Now think about your congregation’s planning process – is the question of “who should be involved?” routinely asked? Were the right people involved in setting the goals that you identified a few minutes ago?

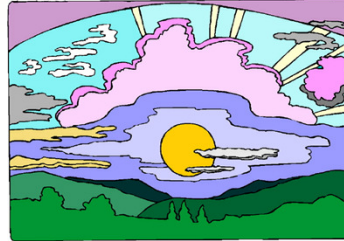
Note responses on a flip chart.

Let’s look at each stage in the planning cycle with this background in mind.

Discernment Is Important

“The human mind plans the way, but the Lord directs the steps.”

Proverbs 16:9



Planning for Effective Ministry - 8

Fresh Start

Talking Points:

Discernment, undertaken in the context of prayer, involves answering three questions:

1. Who are we?
2. Who is our neighbor?
3. What is God calling us to do?

Who Are We?

It **is** true: You need to know where you have been before you can plan where you want to go.

- **What is the congregation's history and identity?**
- **Where has Christ been present in the congregation's past 5-10 years? Where is He now?**

Talking Points

Take a minute to think about your congregation's history.

Either distribute Handout 2 and give them a few minutes to jot down their responses, then share within a small group OR ask the following questions for a whole group discussion. If discussion takes place in small groups, facilitate a sharing of observations with the large group.

What has been the history of your congregation? What were its founding years like? How has its membership, mission and/or purpose changed over the course of its life? What has caused these changes?

Who Is Our Neighbor?

- Congregational Profile
- External data – Our Ministry Context
- Interviews with neighborhood officials
- Other data-gathering



Planning for Effective Ministry - 10

Fresh Start

Talking Points

How do we find out who our neighbors are and who and how we are called to serve?

If you were called to your congregation after a search, one place to start would be to revisit the **Congregation Profile** (now probably one or two years old) to look at how the congregation described its neighbors.

Another option is to order a **Percept** or other external analysis of the demographics of the community surrounding the congregation. This type of data can be very helpful in looking at who the congregation is, who its neighbors are, and what the similarities and the disconnects are (i.e. the congregation is predominately a group of 45-60 year olds, and the community's average age is 33). **Percept** also has a process, *ReVision*, that helps a congregation compare who they are with who the neighborhood is and to plan programs, evangelism, and outreach accordingly.

Interviews with neighborhood officials (city council members, social workers, police, school principals) can help you identify the needs of your neighbors, while building relationships.

What other methods might you try? Remember: whatever information you gather is only grist for the mill; the resources do not provide “the answer” and you need to consider what, given its history and its current situation, the congregation is called to do.

Where is Christ Leading Us?

“You will be my witnesses in Jerusalem, in all Judea and Samaria, and to the ends of the earth.”

Acts 1:8



Planning for Effective Ministry - 11

Fresh Start

Talking Points

Given the history and identity of your congregation and the context within which it is ministering, who are the people to whom you should be witnessing? Where is God calling you? One way to think about this is offered by Gil Rendle in Holy Conversations. The people of Jerusalem are the current members. Those of Judea are like current members, but are not currently active (they may come occasionally such as to be married or for High Holy Days, and when they do come they are not seen as “different”). Those in Samaria on the other hand are people who are different from us, though they live close by so we may run into them or actually meet them. If they do happen to come to church we see them as different and may not know how to respond (for example, a high-school dropout who comes to a congregation whose membership is largely college-educated). Those at the end of the earth live far (at least relatively) away – we would never expect to meet them or know their names, but we feel a responsibility to or for them.

Who are these people for your congregation?

Distribute Handout 3 and ask people to complete it, then share with a partner or small group. You may also choose to hold the discussion using the questions from Handout 3 in the large group. If small groups engage in discussion, take a few minutes for them to share their observations with each other.

Note: This exercise is found in Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations by Gil Rendle and Alice Mann. A graphic illustrating the Jerusalem, Judea, Samaria, ends of the earth continuum is found on page 80. You might want to draw the graphic on a flip chart to illustrate the widening circles of congregational responsibility and concern.

Mission and Vision Statements

- Mission – identity and purpose
- Vision – what we would be if we lived up to our mission statement
- Unique and specific as God's call



Talking Points

It is only with a clear, shared sense of identity and vision that planning can begin. Mission and vision statements are often couched in very generic terms – they could describe any Episcopal congregation (e.g., to serve Christ and our neighbors). What makes them valuable is if they are unique and specific to the congregation because then they become the lodestars for action. From these flow objectives that describe what the congregation is going to focus on. With these in place, it becomes easy for vestry, rector, committee chairs, and staff to develop goals and action plans that can be assessed for their congruence with the mission and vision.

Epiphany's Mission Statement

- We at Epiphany are called to journey together in faith, and to reveal the presence of Christ in the world,
- By sustaining a community in which all are welcome,
- By celebrating liturgy that nurtures us and sends us forth,
- And by caring courageously for our neighbors and ourselves.

Planning for Effective Ministry - 13

Fresh  Start

Talking Points

The Church of the Epiphany in downtown Washington, DC, is one of the parishes profiled in Diana Butler Bass' research on thriving mainline congregations. Their mission statement is a good example of one that is unique and provides guidance for the development of goals and objectives. According to the rector, the Rev. Randolph Charles, there are three clear objectives: to serve people in need, celebrate the arts, and build inclusive community. The parish is known for its outreach to the urban homeless, feeding a couple hundred of them every Sunday morning; its support of downtown workers; and its midweek music program. Its "Jerusalem" is a diverse congregation that includes the homeless who routinely worship as part of the congregation.

What is your congregation's mission statement? How does it measure up to the criteria of being unique and specific to the congregation and its context?

Next Steps

- Objectives – our commitment
- Goals – steps toward our objectives
- Action plans – what will be done; accountability, timeframe
- Implementation
- Reflection/review

Talking Points

With mission and vision set, the next step is to develop objectives, goals and action plans and then assure accountability by engaging in a regular process of reflection and review.

Reflection/Review

Is what we are doing:

- Right?
- In accordance with our plans?
- Still needed?



Planning for Effective Ministry - 15

Fresh Start

Talking Points

Every living system needs feedback to keep it “on track.” Congregations are no exception. In addition, giving an account of our actions to God is a fundamental aspect of the Christian life.

Jesus sent **seventy disciples** on a mission (Luke 10:1ff) to heal the sick and proclaim the kingdom of God. These seventy returned to proclaim what miracles had happened in God’s name. Note that the disciples went in pairs – ministry is not done alone. When they returned it was a chance to check in with each other and with Jesus. Jesus commends them for their work – but reminds them that the REAL work is not having demons submit, but proclaiming the Kingdom of Heaven. Jesus reorients them to the foundational task – proclaiming God’s presence (feedback).

The **parable of the talents** (Matthew 25) portrays the need to be accountable to God for the gifts given to individual Christians.

Together these two scriptures, bearing witness to the activity of God and giving an account of our actions, form the basis of a periodic “check-in” to see how things are going.

Reflection/Review Looks At. . .

- Activities
- Expectations
- What happened
- What was learned
- Implications for future

Planning for Effective Ministry - 16

Fresh Start

Talking Points

The military calls them “After Action Reviews” – did we accomplish what we said we were going to do, in the agreed-upon timeframe and within the resources we were given? Were there unintended consequences? What went well? What would we do differently in the future?

A look at five aspects of any goal or activity serves as a useful template for this review.

Activities: what did we say we would do?

Expectations: what did we expect would happen?

Actuality: what actually did happen?


Learning: what did we learn?

Implications: what are the implications for the future?

Consideration should be given to the resources (people, financial, talent and skill) used and the process (Were the right people involved? What about coordination and cooperation, communication, working relationships?)

From this kind of a review can come a group conversation – collective learning that can lead to continuing on as before, minor adjustments, major rethinking about the appropriateness, resource requirements, or direction of a goal.

Types of Reflection/Review



- **Formal**
- **Informal**
- **Personal**

Planning for Effective Ministry - 17

Fresh Start

Talking Points


Reflections/reviews can be:

Formal – usually done after a major undertaking, when unexpected consequences loom large, or when there is a need to seriously consider a major change in direction. They are scheduled, facilitated by an outside neutral party, and often involve outside stakeholders (grantees, for example, or contactors) or external data sources (e.g., PERCEPT or other data compilations).

Informal – called by a group (for example, a parish committee) with a need for real-time feedback to learn from a shared experience or event. These may take place at a meeting or via conference call, require no preparation, take little time, and can be held in almost any setting. Vestries and committees who regularly ask at the end of a meeting “what went well, what could we do differently, etc.” are engaging in an informal type of reflection.

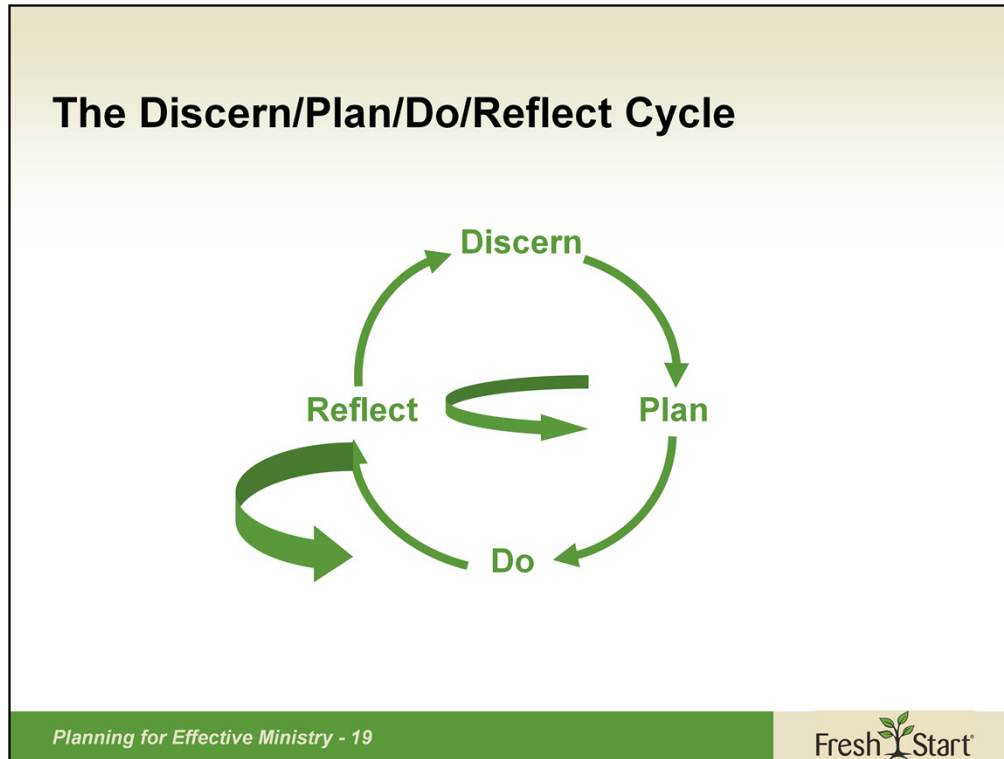
Personal – a disciplined approach by individuals to ask themselves the key questions of what did I do, what did I expect as a result, what actually happened, what did I learn, what are the implications for my future actions. This is good spiritual practice and holds promise for individual learning and growth.

Does your congregation build in times for review and reflection? In how many of these types of review does your congregation actively engage? What are some examples?

Feedback	<u>not</u>	Measurement
<ul style="list-style-type: none"> • In context • Self-determined by circumstances • Open to information • Create meaning from data • Value surprise • System adaptable • Meaning evolves with circumstances 		<ul style="list-style-type: none"> • Preset • Imposed by design • Collect only certain data • Data determines meaning • Value routine • System controlled • Meaning remains constant
<i>Planning for Effective Ministry - 18</i>		

Talking Points

One final point about reflecting on what we have done – what living systems (congregations) need is feedback, not measurement. We are all on information overload, and we choose what is important to us. We pay attention to what is happening *now* and respond. Congregations should do the same – if the context changes, then old ways of doing things may no longer be relevant. If we look to measurement we set predetermined goals and collect information only in fixed categories. We keep ourselves and our congregations more flexible if we are open to information from lots of sources and are willing to be surprised. Being more open allows us to create meaning from the data we gather, rather than have that meaning predetermined by the measurement. Such an approach leaves us open to adapt, to grow, to sustain our mission and ministry even as the environment around us changes. It leaves us, in short, open to the workings of the Holy Spirit. It also frees us from the stultifying effort to try and set measurable goals for ministry and mission and to concentrate on finding out whether what we are doing is worthwhile.



Talking Points:

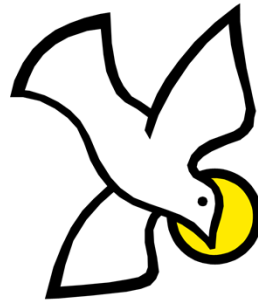
And this cycles us back into the discern mode – or at least to “plan” or “do”. How large a planning process should be depends upon the congregation’s stage of life. Gil Rendle and Alice Mann say that a full-scale strategic planning process is probably an every 3-5 year event. Other types of planning take place within the context of this broader strategic plan. Long-range plans are revisited every year or so, while short-term planning occurs on an as-needed basis.

Congregational size also will impact on the process. Smaller congregations typically move through the process more informally and can engage most of the congregation in any discussion. Very large congregations may need a permanent planning team to oversee the process and make mid-course corrections, while opening up the conversation to the congregation on a more strategic basis.

Congregational values also play a role. Attempts to change something that is viewed as a fundamental value within the congregation should be undertaken only after a broad participation in conversations to discern a new sense of mission.

The True Goal: Serving Christ

The whole purpose is to discern where the community is being called to serve Christ, and to make God's love known in the world.



Planning for Effective Ministry - 20

Fresh Start

Talking Points

The entire planning cycle is about the ongoing creative work of the Holy Spirit and our need to be attentive to the ways and places that Spirit is calling our congregations into being. As such it becomes a spiritual discipline.

Distribute Handout 4 and give participants a few minutes to jot down their responses, then discuss them with their small group or hold a discussion with the full group using the questions below. If the discussion takes place in small groups, facilitate a sharing of observations across all the groups.

What questions does this raise for you? What might you want to do differently in your congregation? Who else needs to be involved? What are your next steps?

Note: the bibliography provides useful resources for congregations engaging in planning and could be used as a handout.