

Vision and Planning

November 2017

Missionaries and Visionaries

Linda Buskirk

God bless the missionaries in our congregations. They are the do-ers. At most churches, almost everyone jumps in for some mission service – bringing food for the pantry, serving as acolytes, ushers, choir members, etc.

Sometimes our missionaries get spread very thin. Sometimes so many people are doing so many things that it's difficult to perceive the fruits of their labors. One to three people may run a great ministry, but it is viewed as "theirs" and few others join or are aware. This can lead to burn-out in the core group, who may become resentful that others don't share in the work.

That's when *visionaries* can inspire renewal. Before you say, "Oh, we don't have any of those," let's examine what vision really is, and its power.

A dream for the future

When Dr. Martin Luther King, Jr. rallied 250,000 people to Washington, D.C. for the March for Jobs and Freedom in 1963, he described his dream for America. His 17 minute speech never called for new federal legislation.

What Dr. King described was a dream that...“my four little children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character.”

Dr. King did *not* say that federal laws should prohibit separate seating in restaurants, but he did say, “I have a dream that one day on the red hills of Georgia the sons of former slaves and the sons of former slave owners will be able to sit down together at the table of brotherhood.”

Dr. King painted pictures of what the *impact* of the mission of the civil rights movement could be. Within two years of Dr. King's speech, several federal acts created sweeping reform. Dr. King's ability to describe a vision finally got hearts and minds to work together for change.

Vision describes the desired *impact* of your mission. In congregations, vision is often born from identifying gifts for ministry.

Six years ago, the Episcopal faith community of St. Paul's, New Albany, Indiana, explored the gifts of its people and what God was calling them to do with those gifts. Several people had a passion for the arts – many were artists themselves. They envisioned the arts as central to their ministry. The vision grew to be an [extraordinary arts outreach](#) that blesses their downtown and generates funding to support their feeding ministry.

The power of visioning

It was a large estate gift several years ago that prompted the congregation of Trinity Logansport, Diocese of Northern Indiana, to start thinking about future impact. With an identified desire to serve and to preserve their ministry home, Trinity's missionaries became visionaries, directing that half of the fund's annual proceeds would support outreach ministry and half would go to building maintenance. They deposited the gift at the local community foundation which at the time matched the investment dollar for dollar. But if you conclude that *that's* how Trinity Logansport “affords” its ministries, you are not realizing the full power of vision.

Rector Clark Miller explains, “When we started looking outside our walls, we started to grow. When you start giving things, things come back to you. The people of Trinity give willingly of their money and time. People don't say, ‘let the endowment take care of it’ – they jump in to help.”

This congregation with average Sunday attendance of 65 supports an [annual school backpack project](#) which distributes 750+ backpacks filled with all the supplies students need. Other congregations in Logansport have caught the vision, rejoicing in the impact of backpack ministry.

Without an expressed, shared vision for the impact of ministries, the people of a congregation can wander aimlessly, missing opportunities for impact that God has gifted them to achieve. Even in a small parish where it's "all hands-on-deck" to provide ministry, the vestry has a very important big picture role to provide the vision towards which all operations are heading. Articulating a vision is one of the most strategic leadership actions a vestry can take.

And don't stop there. Refer to the vision when making important decisions, especially when crafting the budget and annual programs. Affirm that decisions about using talents and treasures are leading toward the vision, not drifting in a different direction.

Sometimes vestry members outright refuse to spend time "visioning" because they think it's light and fluffy, and they have really important issues and crises to think about right now, and they don't have time to sit around and think moonbeam thoughts so let's just set some goals and ask people to give more in annual stewardship. Whew!

Strategic visioning calls us to take a deep breath and think beyond the daily routine's worries and burning fires. It offers the opportunity to listen deeply as people of the congregation describe what they love to do with their gifts, and what they truly want to share with others.

When the listening is done, **describe** the **desired impact** of the church's ministries, or of your existence or presence in your community, or the world. What will be different? Think beyond, "the pews will be filled." Describe how lives will be changed, how hearts will be mended, how Jesus Christ will be known and glorified. As visionaries, the pictures you paint with words will inspire many missionaries to jump in to help make the vision come true.

Linda Buskirk is a capital campaign and strategic solutions consultant for the [Episcopal Church Foundation](#). She brings to ECF diverse experience as a consultant to social-profit agencies, specializing in board governance and strategic development. Linda has a masters degree in public affairs from Indiana University. She lives in Fort Wayne, Indiana, where she and husband Ron are members of Trinity Episcopal Church. She is a graduate of the Congregational Development Institute of the Diocese of Northern Indiana. Linda serves her parish and diocese in many capacities, including roles in stewardship and communications ministries.

Resources

- [Vision for Impact, Not Just Change](#) by Linda Buskirk, Vestry Papers, July 2014
- [The Difference Between Mission and Vision](#) by Linda Buskirk, ECF Vital Practices Blog, January 13, 2012

- [Strategic Thinking for Congregations](#) an ECF webinar led by Donald Romanik, April 23, 2015
- [The Power of a Shared Nightmare](#) by Miguel Escobar, ECF Vital Practices Blog, January 29, 2013
- [Cultivating the Missional Church: New Soil for Growing Vestries and Leaders](#) by Randolph C. Ferebee (Morehouse Publishing, 2012)

The Process of Creating a Mission/Vision Statement

Members of St Philip's Church

Representing St. Philip's Church Boot Camp Leadership Team from the Episcopal Diocese of New York, we all attended the Episcopal Church Foundation's (ECF) [pilot "Boot Camp"](#) in Baltimore, MD in October 2016. This Boot Camp, part of [ECF's Lilly Endowment National Initiative](#) to address the economic challenges facing pastoral leaders, is designed for newer clergy and their lay leaders to provide training and planning on how to collectively meet the financial and leadership challenges of congregational ministry in the 21st century.

This two-day, in-person event was inspiring and spiritually uplifting. Boot Camp generated great camaraderie among fellow Episcopalians; there was a shared focus on challenges and how we can benefit from best practices.

Prior to Boot Camp, our pre-work identified three essential facts about St. Philip's Church on a [storyboard](#), as follows:

- Is a Parish in transition (since we were without a permanent Rector)
- Is a historic and predominately African-American Parish
- From its inception, has a history of advocating and fighting for justice. (Everyone is not aware of this).

Our Next Steps Priority

Upon returning from Boot Camp, our priority was to redefine St. Philip's Mission and Vision statements.

Our first step at the November vestry meeting was to present a summary of the Boot Camp learnings and share what we identified as the priority for St. Philip's. The vestry was responsive to our priority, and at the December vestry meeting, decided to work in collaboration with the congregation to develop an updated Mission and Vision statement, that reflected our priorities.

Initially, we thought we could present the redefined Mission and Vision statements at our Annual meeting in January 2017. This timeframe, however, presented a challenge as the holidays were upon us, and we wanted the entire congregation to participate.

Post-Boot Camp Coaching

A critical component of the Boot Camp process is the individual coaching our rector received. Each Boot Camp rector is assigned a certified, professional coach to help with any issues that may arise during plan implementation. The six months of coaching, twice per month of hour-long sessions, were invaluable. The coaching inspired critical thinking and our rector learned to ask relevant questions that kept us focused and moved us towards progress. Questions included:

- What are you trying to achieve and what steps are being taken to achieve your goal?
- What resources are needed?

- Are you and the team equipped to get it done? If not, how can you receive the training needed?
- Who has responsibility of a given task?
- What is the next action to be taken (meet with the team, schedule a meeting etc.)?

Challenges and Process

We realized a big challenge would be to reach out again to the parishioners to get their input. The team agreed the congregation was already overwhelmed by questionnaires and surveys as we had recently conducted another congregational development program's surveys, as well as questionnaires on our rector Search. We thought it would be best to analyze the results of those surveys, and based on the core findings, we developed the following broad themes:

- Community Outreach
- Open & Inviting/welcoming
- Spiritual awakening

Based on the themes, we reached out to key persons to have guided conversations with a parish focus group. We were committed to working with the congregation to develop the Mission and Vision statements. Based on feedback from the ECF Post-Boot Camp webinars, and findings from the surveys and questionnaires, the team created outlines for the Mission and Vision of St. Philip's.

Next, we identified the members of the parish focus group from chairs/co-chairs of existing ministries, as well as persons not belonging to a "particular" group. The goal was to have a wide cross-section of the congregation based on age and gender.

Our rector, with guidance from his coach, sent an invitation letter to the persons selected to serve on the focus group to solicit their insights and thoughts to develop new Mission and Vision statements.

In early April 2017, the focus group reviewed the statements providing critical input and suggestions, and then our team added their input to the statements.

Our rector reiterated that the statements should represent the entire congregation, and that everyone should be made aware of this important endeavor. We prepared two draft versions of the statements for the wider congregation, and asked them to indicate the version they identified with. The team wanted to ensure the buy-in of the entire congregation prior to presenting the statements to the vestry.

The two versions of the statements were placed on a board with stickers for the congregation to choose. The preferred version was presented at the May 2017 vestry meeting. The team then held a final meeting to work on the rollout of the new statements on Pentecost Sunday 2017 (the birthday of St. Philip's Church).

The Rollout

We wanted the rollout to be a festive, memorable occasion, so it was listed in the Announcements in the church bulletin the week prior the rollout.

For the rollout, we planned and produced the following:

- A brightly colored page inserted in the bulletin, highlighting the Mission and Vision (with Frequently Asked Questions and Answers on its importance on the reverse side).

Questions included how the team came up with the Mission and Vision and how we plan to measure its success.

- Our rector announced the roll-out during the service, and then introduced Maya and Renée who read the questions and answers to the congregation (in a skit format). The entire congregation then read the Mission and Vision statements aloud.
- It was decided that the Mission would be included in the bulletin every Sunday going forward, and would be recited by the congregation prior to the sharing of the peace.
- We wanted to ensure there were constant reminders of the statements in the church, so we created two 3' x 6' vertical banners, and strategically placed them on both sides of the altar.
- Laminated bookmarks with the statements were designed and distributed, and two cakes decorated with the words, "St. Philip's Church Mission & Vision" were shared during the fellowship after mass in the undercroft.

Our rector search committee has incorporated the new statements into the parish profile package received by all candidates.

ECF's Boot Camp provided the tools, resources and expertise to learn how to lead our rector and congregation through the Mission and Vision statement process and the experience has been inspirational and rewarding.

Here is the final Mission and Vision statement:

The Mission of St. Philip's Church is:

To be a welcoming and vibrant international community of faith, focused on sharing the Gospel of Jesus Christ through joyful worship and love, commitment to spiritual growth, and active service in the community.

Our Vision:

- Continue to grow and be an inclusive congregation, meeting the spiritual needs of its members and the wider community.
- Be a church that both celebrates our history and faithfully lives into the future.
- Be a community partner with our local businesses and leaders.

Submitted by:

The St. Philip's Boot Camp Leadership Team

(The Rev. Patrick Williams, former interim Rector; Maya Latimer, lay leader; Renee Parris-Scott, Vestry member)

[St. Philip's Church](#), a historic Episcopal church located in East Harlem, was founded in 1809, and is the oldest black Episcopal parish in New York City.

The Episcopal Church Foundation (ECF) has received a three-year grant as part of Lilly Endowment's National Initiative to Address the Economic Challenges Facing Pastoral Leaders. ECF's grant entitled "From Economic Challenges to Transformational Opportunities" will provide lay and clergy leaders of the Episcopal Church with resources, tools and other support to help address the financial and leadership challenges of congregational ministry in the 21st century. This article was made possible by the Lilly Endowment grant. For more information on ECF's Lilly Endowment Initiative go to www.episcopal.foundation.org.

Resources

- [A Vision for Your Vestry Retreat](#) by Linda Buskirk, February 2, 2015
- [Value One Another \(Vestry Retreat\)](#) by Linda Buskirk, February 9, 2015
- [Getting to the 'Why'](#) by Miguel Escobar, Vestry Papers, March 2013

- [Part I of Getting to the 'Why': Shared Purpose](#) an ECF webinar led by Miguel Escobar, June 4, 2013
- [Part II of Getting to the 'Why': Growing Leaders](#) an ECF webinar led by Miguel Escobar, June 6, 2013
- [Creating Strong Teams](#) an ECF webinar led by Ella Auchincloss, October 3, 2012
- [Cultivating a Culture of Discernment](#) by Blaire Pogue, Vestry Papers, July 2010
- [A Blueprint for Change](#) by Birdie Blake-Reid, Vestry Papers, March 2014
- [How to Select a Consultant](#), a tool is for congregational leaders who are considering hiring a consultant - or professional resource - to assist them in reaching their goals
- [Strategic Planning for Your Church](#), a tool to help congregational leaders do a comprehensive review of all activities, ministries and programs of your church

Five Pitfalls of Strategic Thinking

Susan Erdey

As your congregation tackles daily ministry in a rapidly changing neighborhood, challenging financial climate, or perhaps in a different language – the prospect of strategic planning may seem too daunting. Traditional strategic planning, with its focus on producing a detailed mission statement, setting ambitious goals, and its longer time horizon (often three to five years) can discourage you before you even get started.

That's why the Episcopal Church Foundation (ECF) encourages congregations to undertake a *strategic thinking* process rather than a traditional strategic planning or visioning process. Working through strategic thinking, a congregation articulates its core values, missional identity, and vision – that hopeful future picture of the congregation and community when it accomplishes its mission. Strategic thinking trains leaders to apply a strategy filter to identify and set only those goals that are aligned with the congregation's core values and vision, and make informed, real-time decisions that help bring that vision into being.

Although strategic thinking can be a user-friendly and encouraging process, it's not without its challenges. ECF's Strategic Solutions leadership recently reflected on several common pitfalls they've observed as they've worked with congregations.

1. Thinking you know the answer before you start.

"Congregations discussing their future are sometimes influenced by those who wistfully present the 'if only' list," Linda Buskirk, an ECF Consultant based in Fort Wayne, Indiana, says. "'If only we had a youth minister, then we could attract families.' 'If only we had a new organ, then more people would attend worship.' 'If only we had more money,' 'If only we had a gym,' etc."

But strategic thinking, Linda says, "calls us to set aside the 'if only' list in order to take a deep breath and think beyond the daily routine's worries and burning fires. It offers the opportunity to listen deeply as people of the congregation describe what they love to do with their gifts, and what they truly want to share with others. The result is a vision for the impact of the church's ministries, which in turn inspires participation and energy. All that can be missed *if only* the presumptive 'solution' is sought."

2. Thinking only the vestry needs to participate.

Donald Romanik, ECF's President and a member of the Strategic Solutions team, advises against keeping strategic thinking information too tightly held. "While the rector and vestry need to lead the process and be held accountable for its success," Donald says, "any visioning and planning initiative is doomed for failure without the participation and buy-in of the broader congregation."

"While you need to create an open and inclusive listening process, at some point it has to end and the leadership has to move forward with actual planning and implementation," Donald

cautions. “Often, there is a gadfly or a ‘bomb thrower’ who is going to try to sabotage or thwart the process every step along the way. While rectors have a critical role in helping to articulate observations, common themes, and experiences, they need to step back and become an active listener. There will be plenty of time for the rector to chime in and make it happen.”

3. Ignoring constituencies.

“Several years ago, I received a panicked call from a senior warden in a parish in the Northeast,” Erin Weber-Johnson, Senior Program Director for Strategic Resources and Client Services, recalls. “This small parish’s vestry internally engaged in a traditional visioning process which was limited to the vestry alone – without consulting the broader congregation or ministry heads of leadership. The visioning process ultimately led to the determination that a capital campaign was necessary to live into the vestry’s vision for the parish. They engaged an expensive architect and sub-contractor to redesign the parish’s small kitchen space. A plan was developed. The vestry was surprised when, after taking the plan to the congregation, they learned there was little support. In fact, the Episcopal Church Women (ECW) were very angry. One woman noted, ‘I was not asked my opinion and I spend all my time in this space. Doesn’t God speak to me too? Why is it that I’m only approached now when they need money?’

“This cautionary tale reminds us of why it is important to include everyone in a broad listening process,” Erin says. “In the Episcopal Church, we believe God still speaks today through the Holy Spirit and this Holy Spirit speaks to us individually and collectively as a faith community. Asking ‘What is God calling your faith community to do or be?’ requires a commitment to ensuring all voices are asked and heard. This requires developing an intentional plan for including all members through multiple listening opportunities.

Erin continues, “There’s an African proverb that says, ‘If you want to go fast, go alone. If you want to go further, go together.’ A visioning process can be life-giving for your faith community when all are included.”

4. Forgetting God in the vision.

The strategic thinking process can seem very practical and task-oriented, so it’s crucial to keep God in the forefront of the vision. Jeannette McDonald, an ECF Consultant based in New Hampshire, acknowledges that “often we are driven by our agenda. We are quite good at getting things done, crossing this and that off the to-do-list, but when it comes to listening and being still so we can hear God’s voice, it just doesn’t come easily.”

Jeanette notes, “The foundation of strategic thinking is listening to the wisdom of the whole community as it has been revealed through the love and wisdom of God.”

5. Approach-avoidance – because it’s never the “right time.”

“Congregations often don’t like to face their shortcomings,” notes Janet Lombardo, an ECF Consultant. “They think, ‘If we just keep doing what we are doing it will all work out.’ The question becomes ‘Why are you doing what you are doing and how long have you been doing it this way?’ This is where strategic thinking can be very helpful. God calls us to ministries and missions for a time. Few things are meant to last forever. If a congregation refuses to take a close look at what they are doing and why, they will lose their relevance with the community around them. Strategic thinking helps to refocus your energy on where God is calling you now. Today. When we work where God calls us to be, the work itself will be life-giving and our witness to our community will be strong. No more excuses!”

If you'd like to learn more about ECF's strategic thinking process, visit ECF's [website](#). You can also learn more by viewing ECF's "[Strategic Visioning and Planning for Congregations](#)" webinar.

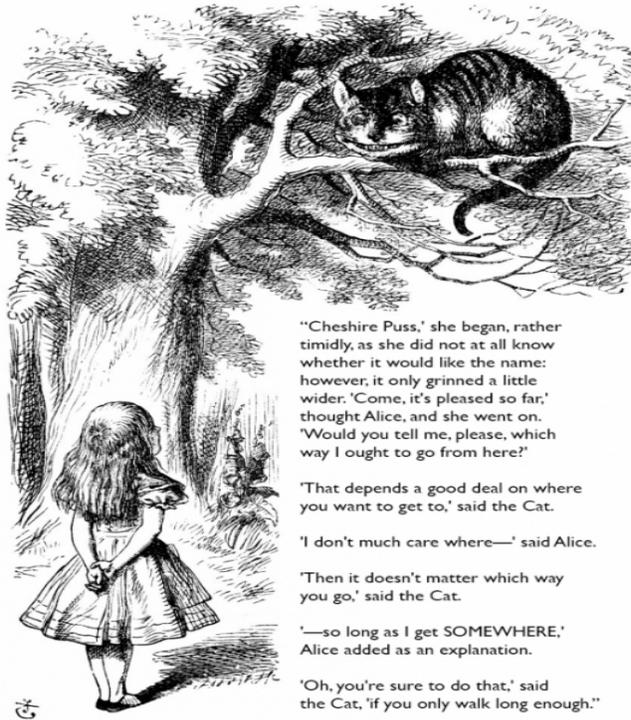
Susie Erdey is Program Director for Strategic Resources and Client Services at ECF. In this role, she supports the broader responsibilities of this program area, especially in the areas of relationship management, customer service, outreach and coordination with the other program teams. Susie is a non-profit management professional with over 20 years of service to Episcopal Church-related organizations, including dioceses, schools and seminaries, and parishes.

Resources

- [ECF First Step](#), an assessment tool for congregations seeking to grow in strategy, leadership, and finances
- [Getting to the 'Why'](#) by Miguel Escobar, Vestry Papers, March 2013
- [Part I of Getting to the 'Why': Shared Purpose](#) an ECF webinar led by Miguel Escobar, June 4, 2013
- [Part II of Getting to the 'Why': Growing Leaders](#) an ECF webinar led by Miguel Escobar, June 6, 2013
- [Cultivating a Culture of Discernment"](#) by Blaire Pogue, Vestry Papers, July 2010
- [Reweaving the Sacred: A Practical Guide to Change and Growth for Challenged Congregations](#) by Carol Gallagher (Church Publishing, 2008)
- [Transforming Congregations](#) by James Lemler (Church Publishing, 2008)

Financial Visioning in Seven Steps

James Jordan



"Cheshire Puss,' she began, rather timidly, as she did not at all know whether it would like the name: however, it only grinned a little wider. 'Come, it's pleased so far,' thought Alice, and she went on. 'Would you tell me, please, which way I ought to go from here?'

'That depends a good deal on where you want to get to,' said the Cat.

'I don't much care where—' said Alice.

'Then it doesn't matter which way you go,' said the Cat.

'—so long as I get SOMEWHERE,' Alice added as an explanation.

'Oh, you're sure to do that,' said the Cat, 'if you only walk long enough.'

Visioning is defined as “the development of a plan, goal, or vision for the future.” In this excerpt from Lewis Carroll’s *Alice in Wonderland*, Alice does not have any vision at all. Alice is going with the flow, doing things the way they have always been done, not rocking the boat, and biding her time on the vestry. By definition, a vision identifies a desired state, usually followed by a goal that is reached. Without a vision of where the congregation wants to be, how will it know when it arrives? If a person cannot imagine success in their mind, how do they ever expect to achieve it?

Visioning is hard, at least to carry the vision through to reality. It takes a leader to have a vision and inspire others to make it their own, too. Too often good visions are not realized for lack of taking the steps necessary to achieve the vision. The vision seems too ambitious, too far into the future, or requires too many resources. Such attitudes will assure the vision will not be

achieved.

What is required of the *process* of visioning is to break the vision down into manageable parts that define the vision, mission, goals, tasks, and activities necessary to execute on a daily basis to move toward the vision. Some might call this the difference between having a strategy and the process of strategic planning.

Congregations often see the future as, “how are we going to end the year with this year’s budget”, or only as far as the plan for next year’s budget. Often, there is no plan in the budget, or money set aside, for future events. Some of those events can be foreseen. For example, the carpet is looking worn, the hymnals or prayer books are losing pages, or the paint is peeling on the exterior of the building. Other events are big surprises, such as the air conditioning needing replacing after failing on Good Friday, or the sudden leak in the sanctuary’s roof. To keep the operations of the church going while planning for the future requires a different perspective on future financial matters than most vestries pursue. It is not about the annual fiscal budget solely. There must be a plan for a number of events, some near-term and some in future years.

Financial Strategic Planning

Step1: Gather data

An assessment must be made of the state of the congregation. What are the demographics of the members and visitors? How has that changed in the last ten years? What is the prognosis for what the demographics will be in the next ten years? And, what does that mean for the future income potential? Using the Episcopal Church’s [“Studying Your Congregation and Community”](#) website, select “view community profile.” Most congregations do not know about this wonderful service that will give both historical and future demographic information about the congregation’s market circle, including households, income, age, ethnicity, and more.

Step 2: Analyze data

An assessment must be made regarding the donors. If the congregation is running [ACS Technologies software](#), a ten-year analysis of individual and total giving can be readily produced. The objective is to learn about the giving trends. What are the congregation's experiences of giving from their donors (amounts and purposes)? Pledge donations are generally for operating purposes, while designated gifts are, too, but for specific purposes. Attention needs to be paid not only to the trend (increasing or decreasing) but also to the ratio of designated giving to total giving. If that ratio is on the rise, I get concerned about the commitment of the members to the congregation's general direction pastorally. A shift away from pledges towards other giving might indicate a problem. This could mean the members do not feel a part of the Body of Christ, but are becoming siloed in their own personal interests or disillusioned with the general vision and mission of the congregation.

Step 3: Take stock of the current status

An assessment of the physical facility must be made. It would be wonderful if there were a fixed asset schedule that listed when the carpet was installed, when the roof was put on, or when the air conditioning system was installed. In addition, a fixed asset schedule would list the estimated useful life, acquisition cost at the time, and estimated remaining useful life. Having one gives future vestries insight regarding when things might need replacing and the ability to proactively plan for them. But the vast majority of parishes do not maintain one. However, the need for understanding this information in order to properly identify future financial requirements beyond operating expenses is very important. An effort must be made to ascertain when some of these components were installed, when they might need replacing, and what the replacement cost would be today. A spreadsheet is helpful to forecast the replacement year, and the estimated future cost.

Step 4: Develop a plan

Develop two budgets – one for operating and one for capital needs. Most congregations are not prepared for an emergency like an air conditioner malfunction. Many are fiscally hurt by such a large, sudden expenditure. The operating budget needs to consider the income and expense expectations for the operation of the church for the year. The capital budget needs to establish projected replacement items, time frames, and costs. While the planning horizon for the operating budget is a year or two, the capital budget planning horizon needs to be sufficient to encompass major components, such as painting, carpeting, roof, plumbing, electrical, air conditioning/heating systems (HVAC), parking lot resurfacing, refurbishing the organ, etc. A twenty-year horizon is the minimum to use for capital budgeting planning.

A year-by-year schedule needs to be developed with the expected capital expenditures per year. This gives a cash requirement by year for future years from which to plan the reserves that need to be set aside and accumulated each year in preparation for the capital event.

Fold the capital cash requirements back into the annual fiscal budget to begin to accumulate the planned repair or replacement of items. This blending of the capital budget with the annual operating budget will yield a new required cash income to support both the capital and the operating budgets for the year. Often, this is an eye-opening experience and generates a lot of capital campaigns to establish or catch up with the cash reserve needs that likely have not been set aside to date.

Step 5: Assess the feasibility of the plan

Refer to the previously mentioned donor analysis and determine if the trend will support the new budget. Often, it appears as though the capital budget cannot be supported by the current giving levels. But it has to. Failure to provide for future large expenditures for the sake of

current gratification of programs or salaries is fiscally not sound, detrimental to future vestries, and risks the future financial stability of the congregation.

Step 6: The Make vs. Buy decision

Do we have the expertise, broad consensus, institutional drive, and manpower to execute the plan in the congregation? I suggest the congregation considers hiring a company that specializes in developing and running stewardship and capital campaigns. They are likely going to conduct a feasibility study initially to determine the appetite of the donors which usually means interviewing specific donors. A reputable company will not recommend a capital campaign that does not have a likelihood of success. They have a reputation to maintain and only want successful campaigns, as you do. They will suggest timing, amounts, messaging, dates, events, and other integral parts of a successful campaign based on their experiences with success. If not hired, the congregation will need to conduct these activities regardless in order to be more successful.

Step 7: Execute the plan

Good planning can go awry in the execution of the plan for a myriad of reasons. Lack of appropriate, clear, and consistent messaging is one of the main reasons for failure. Follow-through, monitoring, and honest in-progress assessments and adjustments can either add to successful execution, or failure to do those things will detract from the successful execution. With good planning and execution, the congregation stands a better chance of achieving the vision.

In summary, having a future vision is a good thing. It entails a strategy that shows hope for the future. Realizing that vision is quite another thing. It takes strategic planning to bring it to fruition. Whether it is this example of budgeting or some other long-range vision, the fruits are

in the process of strategic planning and execution thereof that make the difference between a dream and reality.

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Mr. Jordan is a Certified Public Accountant and Certified Fraud Examiner. His consulting and auditing practice is dedicated to serving only churches and their higher denominational organizations. He is the author of [Financial Management for Episcopal Parishes](#), Revised Edition, 2017, Church Publishing, Inc., New York. He earned his Executive Masters of Business Administration from Emory University's Goizueta Business School, with international business emphasis from London Business School. His speaking engagements span the globe to six continents and dozens of countries. He has conducted live webinars and on-line learning courses for Masters of Divinity credit. Mr. Jordan is an adjunct professor at Emory University's Candler School of Theology, Atlanta, Church Divinity School of the Pacific, Berkeley, CA, and General Theological Seminary, New York City. He and his wife, Eileen, are members of St. Paul's Episcopal Church in Newnan, Georgia. Mr. Jordan is a member of the American Institute of Certified Public Accountants (AICPA), the AICPA Not-for-Profit Section, and the Association of Certified Fraud Examiners (ACFE).

The Episcopal Church Foundation (ECF) has received a three-year grant as part of Lilly Endowment's National Initiative to Address the Economic Challenges Facing Pastoral Leaders. ECF's grant entitled "From Economic Challenges to Transformational Opportunities" will provide lay and clergy leaders of the Episcopal Church with resources, tools and other support to help address the financial and leadership challenges of congregational ministry in the 21st century. This article was made possible by the Lilly Endowment grant. For more information on ECF's Lilly Endowment Initiative go to www.episcopalfoundation.org.

Resources

- [Financial Management for Episcopal Parishes](#) by James Jordan (Church Publishing, Revised Edition 2017)
- [Year Round Stewardship: Talking About Money](#) an ECF webinar led by Chris Harris, February 11, 2014
- [Good Stewardship Addresses Hopes and Fears](#) by Kate Ferris, Vestry Papers, May 2007
- [Create a sound parish budget](#) by Craig Bossi, Vestry Papers, July 2009