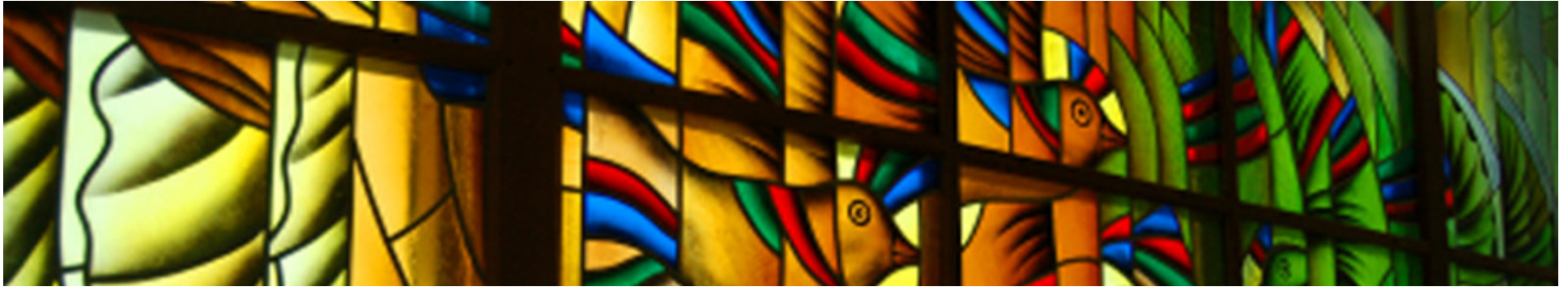


Two polls on vision and planning

Does your congregation have a clear picture of what it wants to be in the near future?

Does your congregation have a strategic plan for the near future?





Picturing the Future: Vision and Planning

Donald V. Romanik

President, Episcopal Church Foundation

February 4, 2014

Vision and Planning Presenters:



Donald V. Romanik
President, Episcopal Church Foundation (ECF)



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Program Director, Leadership Resources



What is the Episcopal Church Foundation (ECF)?

Overview:

- Independent and lay-led organization
- ECF's mission is to strengthen the **leadership** and **financial** capabilities of Episcopal congregations, dioceses, and other institutions
- ECF carries out this mission through a wide array of programs including...



Leadership Resources

- ECF Vital Practices (www.ecfvp.org)
- Fellowship Partners Program
- Educational Events

Financial Resources

- Capital Campaigns
- Planned Giving
- Endowment Management
- Educational Events

Opening Prayer on Vision

Be thou my vision, O Lord of my heart;
Naught be all else to me, save that thou art;
Thou my best thought, by day or by night,
Waking or sleeping, thy presence my light.

Riches I heed not, nor man's empty praise;
Thou mine inheritance, now and always;
Thou and thou only, first in my heart,
High King of heaven, my treasure thou art.

- Eleanor H. Hull



Overview of Vision and Planning



Defining mission and vision



Strategic thinking vs. strategic planning



Evaluating proposed strategies



The big question



Potential next steps

Defining mission and vision

Mission = What God has called you to do



As a diocese, we:

- Gather each week for meaningful worship
- Form faithful disciples
- Serve the poor and least of these in our midst
- Use our time, talents, and treasure in service to God's kingdom
- Welcome everyone



Defining mission and vision

Vision = A hopeful picture of future that describes what things will be like when your mission has been accomplished

“Vision plays a key role in producing useful change by helping to **direct, align, and inspire actions** on the part of large numbers of people. Without an appropriate vision, a transformation effort dissolves into a list of confusing, incompatible, and time-consuming projects that go in the wrong direction or nowhere at all.”

- *Leading Change*, John Kotter



Strategic thinking vs. strategic planning

Common problems with strategic plans:

- Mistaking goals for strategies
- Generating more goals than can be reasonably pursued
- Expecting strategies to fit in rigid time lines
- Forecasting 3-5 years into the future from a snapshot in time

Source: La Piana, David. The Nonprofit Strategy Revolution. Fieldstone Alliance: 2008



In light of today's pace of change, is it still reasonable for congregations to do 3-5 year plans?



Strategic thinking vs. strategic planning



Choose just a few goals for the near future, and spend the bulk of time evaluating proposed strategies to meet those goals

Real-time strategic thinking:

- Iterative and ongoing
- Focuses on strategies to meet organizational goals, rather than simply naming goals
- Evaluates proposed strategies in light of mission, financial capacity, an organization's uniqueness, and more.
- Recognizes and tries to address the elephant in the room – i.e. the Big Question

Strategic thinking vs. strategic planning

Strategies are responses to real-time challenges:

Organizational challenges:

How can we gain a stronger sense of shared mission?

What makes us unique from all the other churches in the area?

Programmatic challenges:

How can our programs make a stronger impact in the congregation?

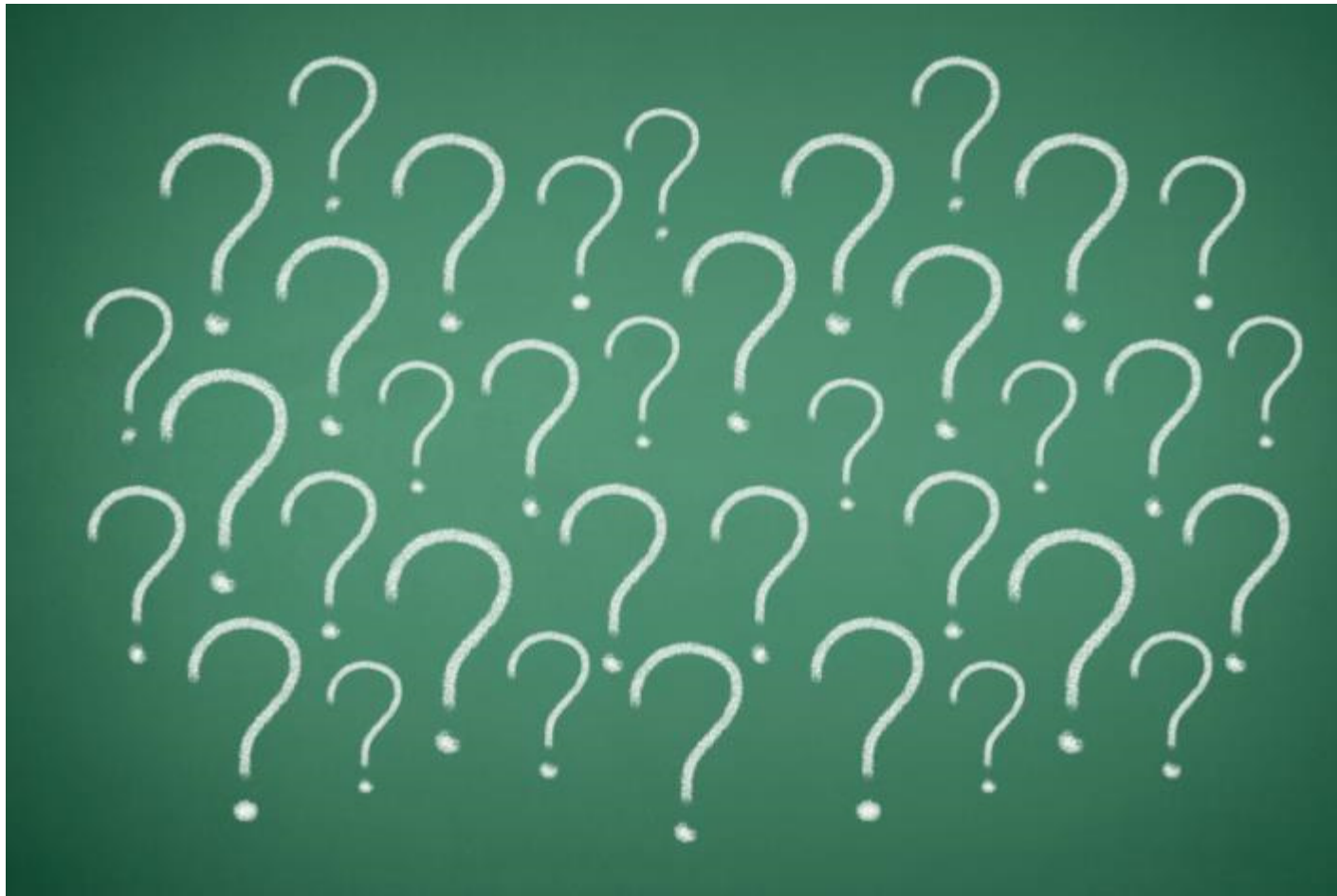
What pilot initiative would address a growing problem in the neighborhood?

Operational challenges:

How do we fund our ministries over the next ten years?

How do we develop a new website that will meet our needs?

Questions on 'vision' and 'strategic thinking'



Someone has a bright idea...



How can we increase funding for our ministries over the next ten years?

Bright ideas:

- Annual fundraising events
- Leverage building for rental income
- Start generating revenue through a small enterprise
- Do a capital campaign to alleviate payments on debt

What criteria will your church use to focus on the best idea of the bunch?

Evaluating proposed strategies



How will your leadership team set the terms by which to evaluate proposals?

Example questions in a strategy filter:

- Does this support our mission and vision?
- Is this unique or does it duplicate others' work?
- Is this financially sustainable through potential gifts or fees?
- Is this consistent with our identity?
- Do we have the internal capacity to begin and sustain this initiative?

Key terms in a strategy filter:

Mission and Vision



Uniqueness



Financial sustainability

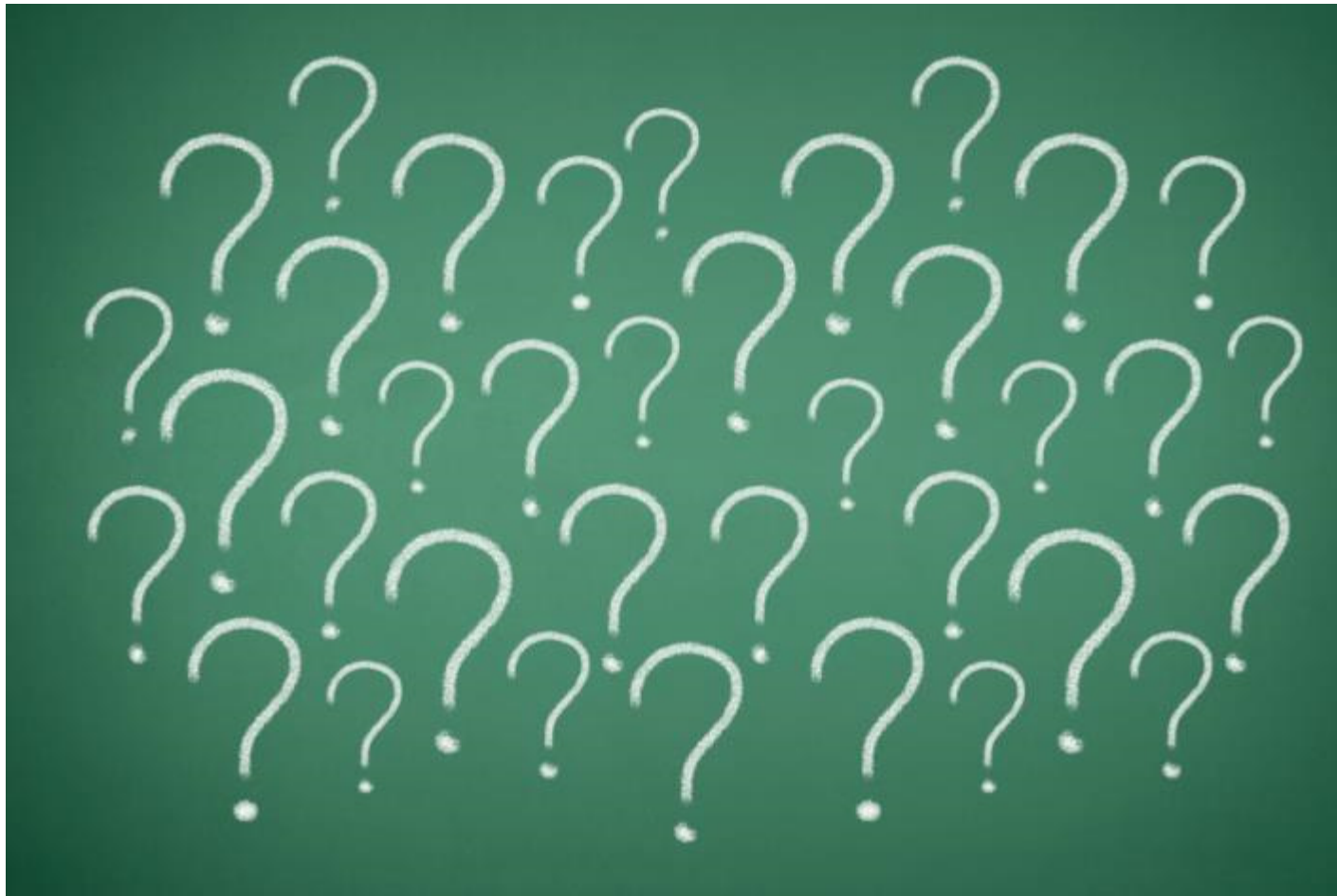


Identity

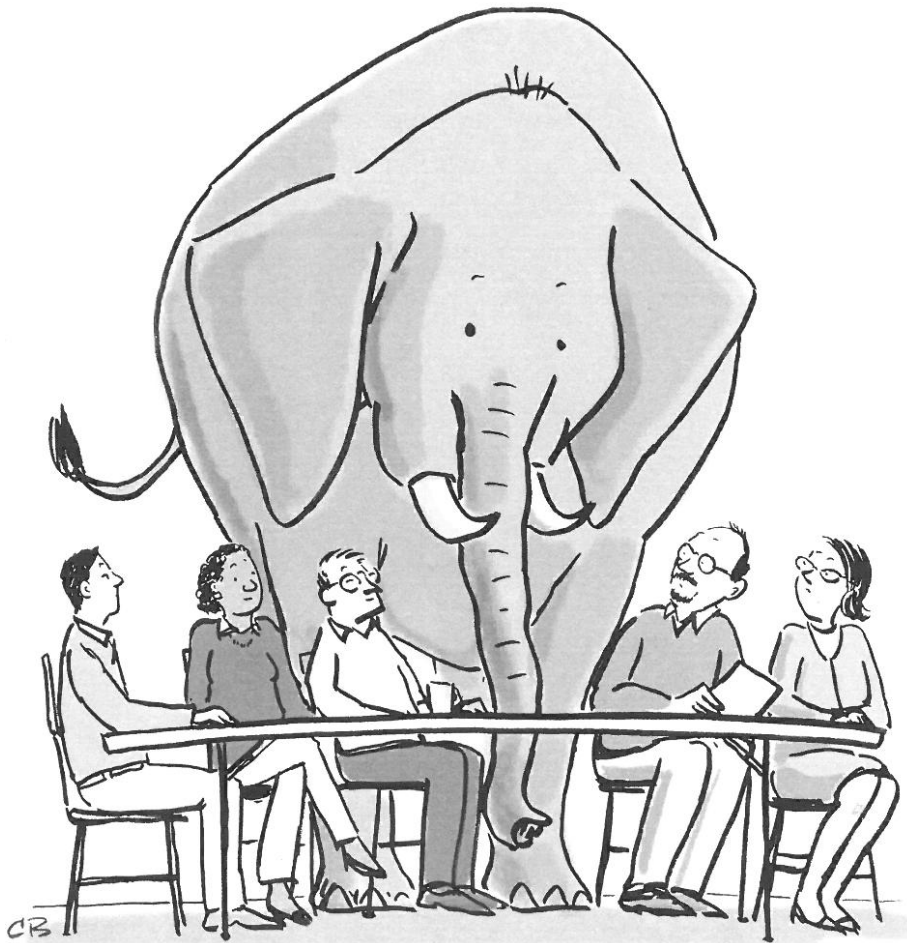


Internal capacity

Questions on evaluating strategies



The Big Question



Someone in the vestry finally addressed the elephant in the room.

“A Big Question is an opportunity or threat to which the organization must respond. Usually, it is beyond the scope of the organization’s current strategies, thus requiring a new approach.”

- David La Piana



The Big Question

Example Big Questions:

- Our building demands a disproportionate amount of our resources. How will we move from a focus on building maintenance to mission?
- Our church has just received news of a significant bequest. How do we best use these funds?
- Our town is facing massive depopulation. How will St. Mary's carry out its mission with fewer members and fewer *potential* members?



Addressing the Big Question:

- Requires “fresh thinking” and a willingness to go to outside perspectives, voices
- Requires a willingness to acknowledge that this is beyond the scope of the current organization
- Requires humility and prayer as you move toward evaluating initial proposals



Group discussion on potential next steps

- Move the focus of your leadership team (vestry, mission committee, etc.) toward a focus on ongoing discernment of God's mission and vision for the congregation
- Together describe what the church/world would look like if you accomplished your mission
- Regularly communicate that vision to the wider congregation. The community will help refine this vision
- Become clear about your 2014 challenges at the organizational, programmatic, and operational levels



Group discussion on potential next steps

- Identify just a few goals for 2014 and spend majority of time brainstorming strategies for how to achieve those goals
- Develop and use a strategy filter to evaluate the proposed strategies
- Together name your big question: an opportunity or threat beyond the congregation's scope
- Return to the big question regularly. Discuss it, pray about it, reflect on it – an effective strategy will begin to emerge

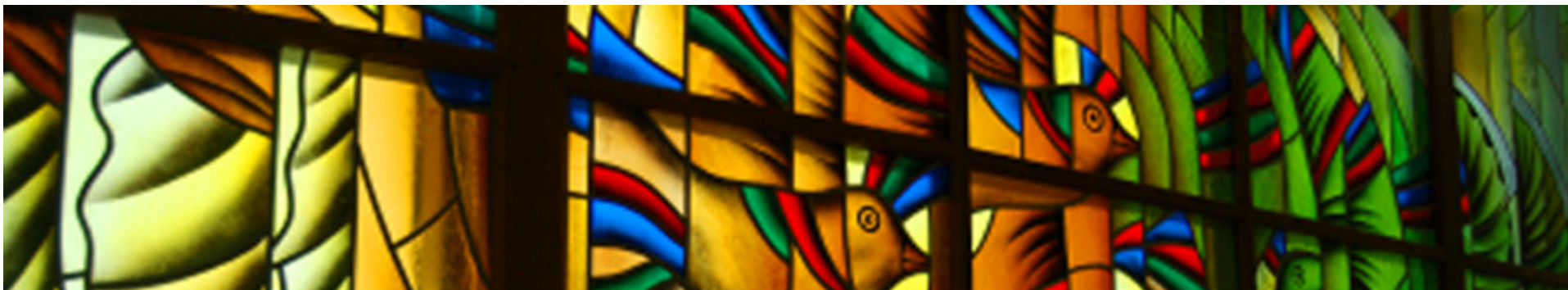


ECF Strategic Solutions

For dioceses, congregations, Episcopal schools to discern and envision future ministries:

- Visioning, mission, and strategic planning
- Responding quickly and effectively to changing realities
- Building a heightened sense of identity, purpose, and direction
- Putting plans into action





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