

Before we begin...

Three quick questions:

- Is your congregation beginning a strategic planning process?
- Do you know the difference between a congregation's "mission" and its "vision"?
- Did you read the article "Vision for Impact, Not Just Change" by Linda Buskirk?



Holy Shift: Strategic Thinking for Congregations

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

Episcopal Church Foundation



The Episcopal Church Foundation (ECF) provides comprehensive and innovative programs, products and services in the areas of leadership and financial resource development. ECF programs and services include Vital Teams, *ECF Vital Practices*, and the Fellowship Partners Program, capital campaigns, planned giving, endowments, and strategic solutions.



Donald V. Romanik



Donald V. Romanik has been President of the Episcopal Church Foundation (ECF) since 2005. Formerly, he served as an attorney in both government and private practice and has been active in civic, charitable and religious organizations.

While at ECF, Mr. Romanik has stabilized its infrastructure, led a comprehensive strategic planning process, and developed partnerships and collaborations throughout the Church. He is a proponent of lay leadership and the ministry of all the baptized. His book, *Beyond the Baptismal Covenant: Transformational Lay Leadership for the Episcopal Church in the 21st Century*, advocates for a new type of entrepreneurial priest and effective lay+clergy partnerships.



Disturb us, Lord...

Disturb us, Lord, when we are too well
pleased with ourselves,
When our dreams have come true
Because we have dreamed too little,
When we arrived safely
Because we sailed too close to the shore.

Disturb us, Lord, when
With the abundance of things we possess
We have lost our thirst
For the waters of life;
Having fallen in love with life,
We have ceased to dream of eternity
And in our efforts to build a new earth,
We have allowed our vision
Of the new Heaven to dim.

Disturb us, Lord, to dare more boldly,
To venture on wider seas
Where storms will show your mastery;
Where losing sight of land,
We shall find the stars.
We ask You to push back
The horizons of our hopes;
And to push into the future
In strength, courage, hope, and love.

- Attributed to Sir Francis Drake



Overview of Holy Shift: Strategic Thinking for Congregations



- i. One congregation's story
- ii. The difference between "mission" and "vision"
- iii. Strategic thinking vs. strategic planning
- iv. Naming goals and evaluating proposed strategies
- v. Resource sheet for strategic thinking
- vi. Discussion on next steps

One congregation's story

Christ Church, Pensacola, FL

- Identified ministry strengths
- Discerned a “vision for impact”
- Developed goals based on their vision
- Developed values – or strategic criteria – for evaluating how they would achieve their goals



The difference between “mission” and “vision”



Mission describes what God is calling your congregation to do at this moment in time.

Most missions are in the form of a statement, but an informal mission description can be a simple list.

At St. George's, we are called to

- *Welcome everyone*
- *Gather weekly for worship and 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*



The difference between “mission” and “vision”

Vision is a hopeful picture of future that describes what the congregation and world will look like when your mission has been accomplished.



Christ Church’s vision:

“Diverse and faithful community in which the openness of Christ Church to welcome and engage all people in a faith journey will continue to grow”



How vision guides strategic thinking



“Vision plays a key role in producing useful change by helping to direct, align, and inspire actions on the part of large groups of people.”

- Leading Change, John Kotter

Role that vision played at Christ Church:

- In 2008 economic downturn, goals became a guiding force
- Vestry reviewed goals annually and worked to strengthen Christ Church’s ability to achieve them
- “The goals were a gift of hope to us... They helped us focus in the midst of keeping above water...”



Strategic thinking vs strategic planning

Common problems with strategic plans:

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



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

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



Strategic thinking vs. strategic planning



Real-time strategic thinking:

- Iterative and ongoing
- Identifies congregational goals that are aligned with long-term vision
- Identifies strategies for reaching those goals
- Evaluates long-term and short-term strategies in light of mission, financial capacity, an organization's uniqueness, and more.



Any questions?

- What are your congregation's ministry strengths?
- Does your congregation's mission and vision reflect those strengths?
- Does your congregation have a hopeful vision of its future?
- If your congregation has a strategic plan, how frequently does it review its plan?
- Do you understand the difference between a hopeful vision, goals related to that vision, and strategies for achieving those goals?



The difference between “goals” and “strategies”

- Goal is a specific and measurable statement of a desired result
- Goals should be aligned with overall vision
- It's not enough to identify goals. Strategies need to be articulated for meeting those goals
- Identify one vision, a few medium- to long-term goals, and then evaluate proposed strategies for achieving those goals



Evaluating proposed strategies



Goal: Increase funding for our ministries over the next ten years?

Proposed strategies:

- 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

Discussion on next steps

- **Focus on discernment** - Move the focus of your leadership team (vestry, mission committee, etc.) toward ongoing discernment of where God is calling your congregation.
- **Discern strengths** - Spend time discerning the ministry strengths of your congregation. How are they described in your congregation's mission and vision?
- **Vision** - Together describe a hopeful picture of what the church/world would look like if you accomplished your mission. What is the impact you are striving to achieve?
- **Goals and strategies** – Identify a few major goals for 2015 and spend the bulk of time brainstorming strategies for how to achieve those goals.



- **Develop a strategy filter** and use it to evaluate the proposed strategies.



Resources for strategic thinking

ECF's Strategic Solutions Program

ECF's Strategic Solutions program offers facilitation and assistance for congregations, dioceses, and Episcopal schools to envision and fund future ministries. Through Strategic Solutions, we work with leadership teams to craft responses to real-time challenges related to organizational, programmatic, and/or operational challenges. To learn more about ECF's Strategic Solutions program, please contact Kate Adams, ECF Special Projects Director at 800.697.2858, ext. 6008 or kate@episcopalfoundation.org.



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Contact Us

ECF website: www.episcopalfoundation.org

ECF Vital Practices: www.ecfvp.org

Email: ecf@episcopalfoundation.org

Phone: (800) 697-2858

