

Before we begin...

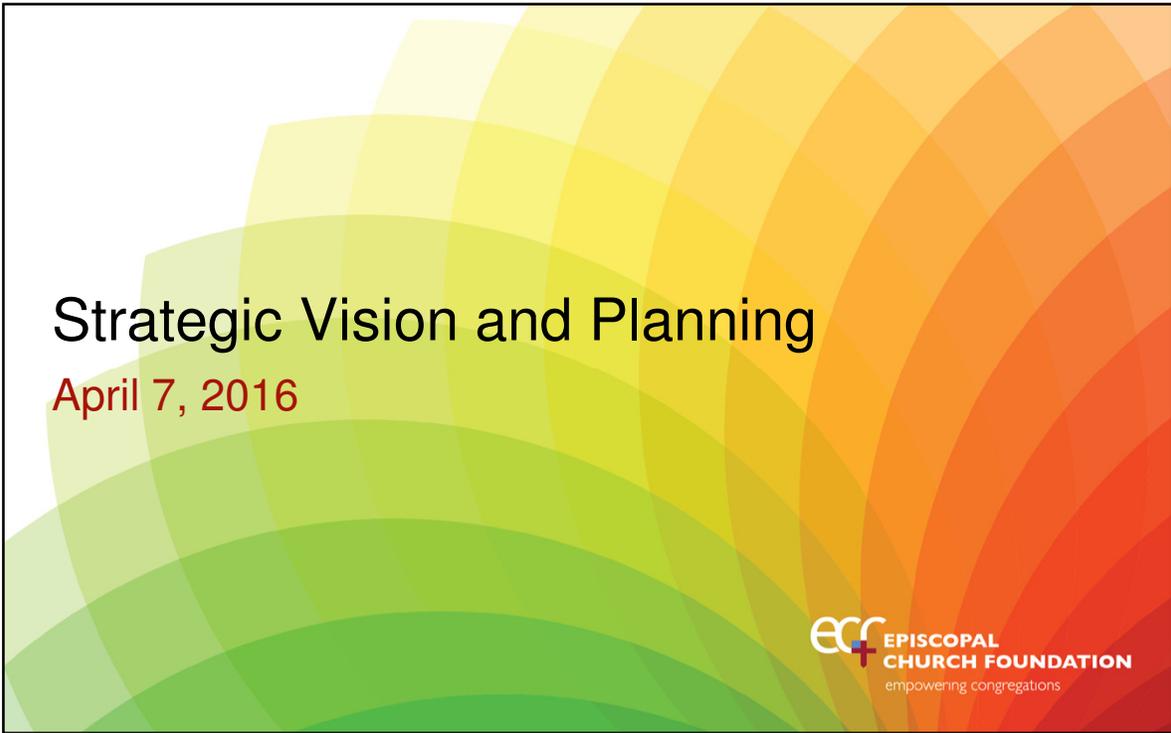


- Is your congregation beginning a strategic planning process?
- Do you know the difference between a congregation's "mission" and its "vision"?

Technical Notes

- ECF may need to mute all participants to limit background noise and audio interference
- To start your web cameras, press the "Start my Web Cam" button and "Start Sharing"
- If you have questions, please type them into the chat box on the right-hand side of the screen
- PDFs of the slides and resource list are available for download
- This webinar is being recorded and will be made public





Strategic Vision and Planning

April 7, 2016



**EPISCOPAL
CHURCH FOUNDATION**
empowering congregations

The Episcopal Church Foundation (ECF)

Independent, lay led organization, founded in 1949



Empowers congregations through visioning and planning, leadership development, and raising financial resources for ministry

Through our programs, ECF is building a Church...

- Lay and clergy leaders work together to transform the Church
- Healthy, vital, vibrant Episcopal communities of faith
- Meaningful opportunities for Christian stewardship and effective fundraising
- Innovative, mission-based ways to be the Church of the future



**EPISCOPAL
CHURCH FOUNDATION**
empowering congregations

Presenter



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

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.

Let us pray...

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 Strategic Vision and Planning



- i. One cathedral'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 cathedral's story

St. Mary's Cathedral:

- Identified ministry strengths
- Created an identity statement
- Identified three key areas for further work
- Developed strategic criteria for evaluating how they would achieve their goals

St. Mary's Cathedral is an Episcopal faith community in the downtown area that is faithfully engaged in participatory, meaningful and relevant worship, forming and empowering Christian disciples and nurturing each other, the city, the region and the diocese through outreach, fellowship, enrichment, hospitality and service all in the name of Jesus.

Difference between 'mission' and 'vision'

What is mission?



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. Paul'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

Difference between 'mission' and 'vision'

What is vision?

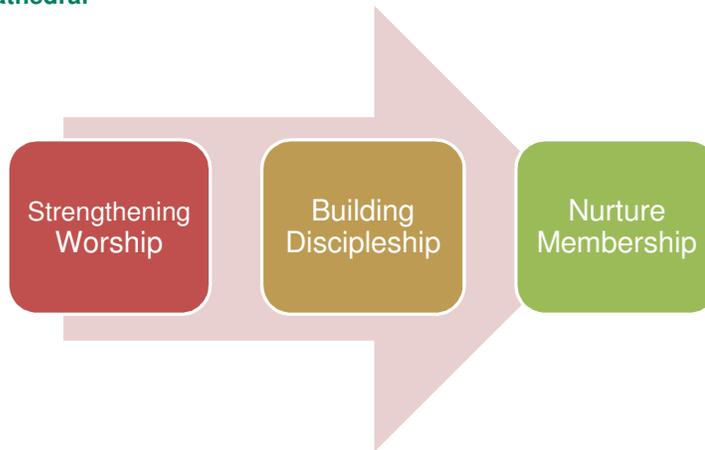
Vision is a hopeful picture of the future that describes what the congregation and world will look like when your mission has been accomplished.

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How vision guided strategic goals

At St. Mary's Cathedral



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?

Using the S.M.A.R.T. method for naming goals

What is a S.M.A.R.T. goal?

Specific Strategy
Measurability
Assigned to
Realistic
Time-specific



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

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?



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

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 2016 and spend the bulk of time brainstorming strategies for how to achieve those goals.



Upcoming ECF webinars

- April 19 from 7-8 PM ET – *Primeros pasos para liderar cambios*
- April 20 from 7-8 PM ET – Determining Spending Rules and Investment Allocations
- May 3 from 7-8 PM ET – First steps in Understanding Congregational Conflict



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