

# 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

Miguel Escobar and Brendon Hunter

Episcopal Church Foundation

*May 8, 2014*

# 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](http://www.ecfvp.org))
- Fellowship Partners Program
- Educational Events
- Vital Teams
- Vestry Resource Guide

## 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 community of faith, 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:**

Are our programs aligned with our mission & vision?

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

# Aligning “mission” and “operations”



From “[Sharing Personnel Costs](#)” by the Rev. Greg Syler

“I genuinely experience God calling me – and, frankly, the Episcopal Church – into greater partnering, sharing, and collaboration.”

“We’re pretty good about sharing ministries and programs. We haven’t, yet, shared structures: money and power.”

New charter toward newly incorporated entity including shared checking account from which all personnel costs are paid.

# 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

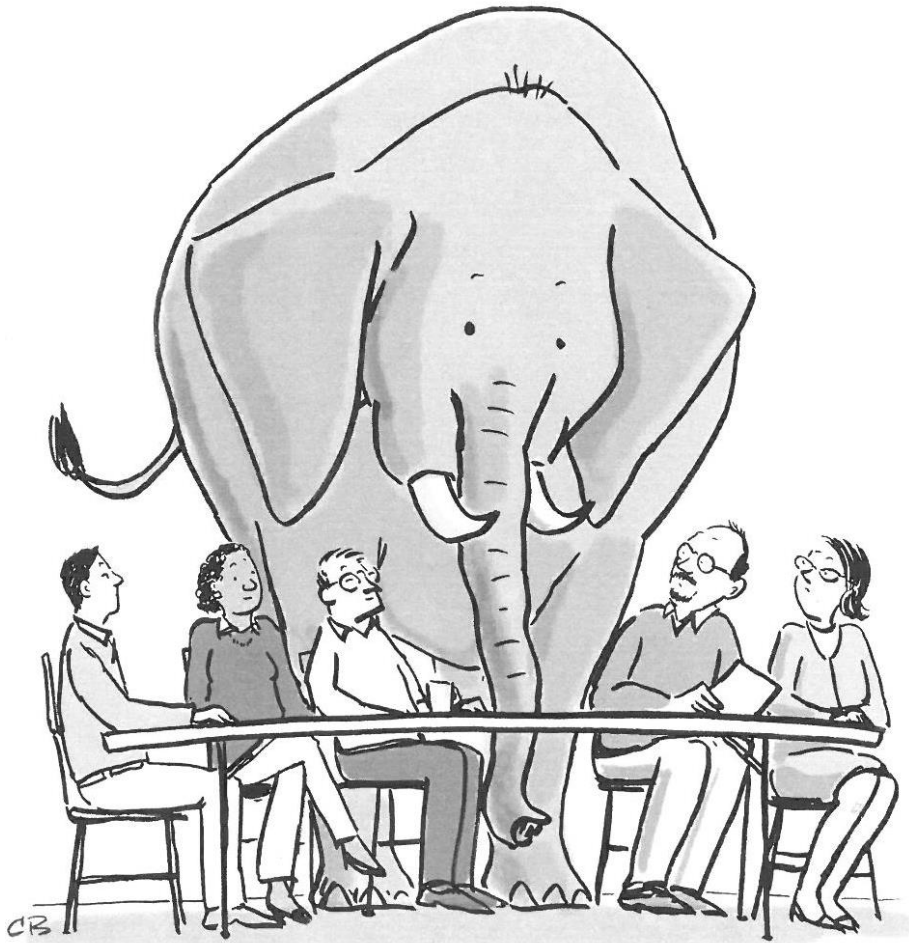
Internal capacity



# 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





## Contact Us

# Episcopal Church Foundation

ECF website: [www.episcopalfoundation.org](http://www.episcopalfoundation.org)

ECF Vital Practices: [www.ecfvp.org](http://www.ecfvp.org)

Email: [ecf@episcopalfoundation.org](mailto:ecf@episcopalfoundation.org)

Phone: (800) 697-2858