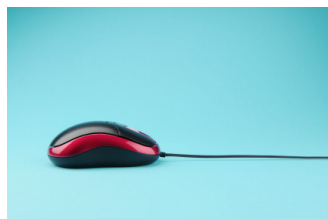


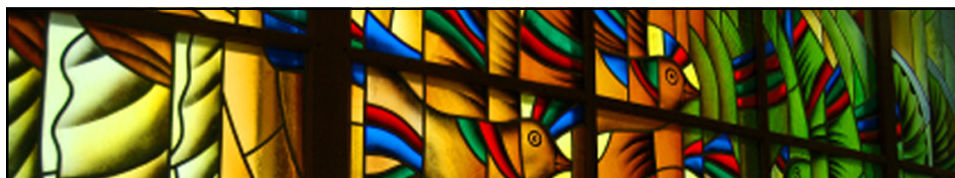
Welcome to Vision and Planning!

A Few Notes:

- All participants are currently muted to cut out background noise and audio interference.
- To start your web cameras, press "Start my Web Cam", "Allow", and "Start Sharing".
- If you have questions, please type them into the chat box on the right-hand side of the screen.
- PDF's of the slides and resource list are downloadable by highlighting the desired file and clicking "Save to Desktop."
- This webinar is being recorded and will be made public.



Use the chat box to tell us where you are from and what you hope to learn from tonight's webinar!



Picturing the Future: Vision and Planning

Donald V. Romanik
President, Episcopal Church Foundation

September 24, 2013



Vision and Planning Presenters:



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



Miguel Escobar
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

Bible Study

The Mission of the Twelve

Then Jesus called the twelve together and gave them power and authority over all demons and to cure diseases, and he sent them out to proclaim the kingdom of God and to heal. He said to them, 'Take nothing for your journey, no staff, nor bag, nor bread, nor money—not even an extra tunic. Whatever house you enter, stay there, and leave from there. Wherever they do not welcome you, as you are leaving that town shake the dust off your feet as a testimony against them.' They departed and went through the villages, bringing the good news and curing diseases everywhere.

- Luke 9:1-6



Overview of Vision and Planning

Strategic thinking vs. strategic planning

Evaluating proposed strategies

The BIG QUESTION

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?

If so, how helpful has the strategic plan been?



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 care for our building over the next ten years?

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

Questions on strategic thinking vs. strategic planning



Evaluating proposed strategies



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

Key questions in ECF's strategy filter:

- Does this support our mission?
- 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 = What You Do	Vision = Pictures church/world when "mission accomplished"
We gather each week for meaningful worship	People will be engaged by worship and their faith will be deepened
We form faithful disciples	Our lives will be rooted in Bible and spiritual practices
We serve the poor and least of these in our midst	The lives of the poor in our midst will be improved through faithful service
We use our time, talent, treasure in service to God's Kingdom	Our many ministries reflect the many gifts of our community
We welcome everyone	Everyone who walks through our red doors will be deeply welcomed

Key terms in a strategy filter:

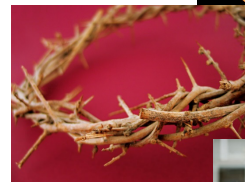
Uniqueness



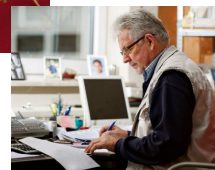
Financial sustainability



Identity



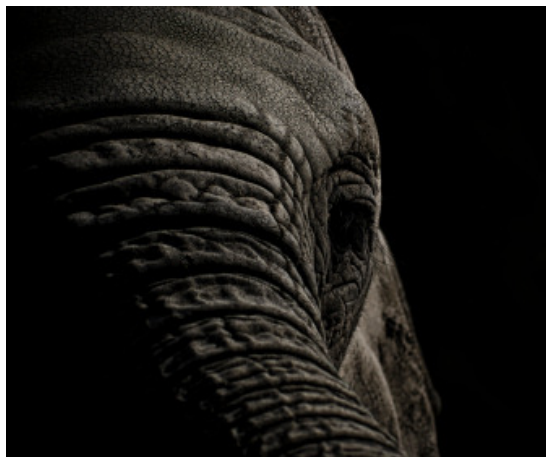
Internal capacity



Questions on evaluating strategies



The Big Question



“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 town is facing massive depopulation. How will St. Mary's carry out its mission with fewer members and fewer *potential* members?
- How should our congregation instill a sense of Episcopal identity in a post-Christian, nondenominational world?

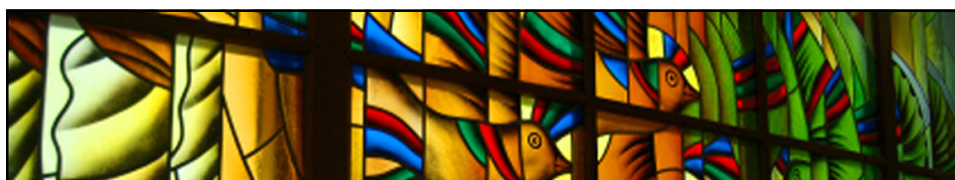
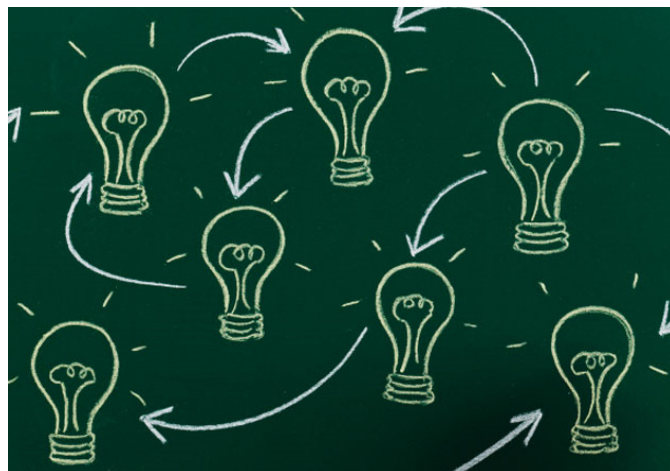


Addressing the Big Question:

- 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



Sharing ideas and best practices...



Contact Us

Episcopal Church Foundation

ECF website: www.episcopalfoundation.org

ECF Vital Practices: www.ecfvp.org

Email: ecf@episcopalfoundation.org

Phone: (800) 697-2858



Strategic Solutions

Facilitation and assistance for dioceses, congregations, and Episcopal schools to discern and to envision their 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



Feedback Survey on Vision and Planning

