

## ***STRATEGIC PLANNING WORKSHEET<sup>1</sup>***

**Directions:** The following is a list of twelve ministry objectives along with their development teams that review the strategic planning process.

Assign each objective to a leader/champion who will recruit a team from the strategic leadership team (SLT) and the congregation for its development. Note that each objective lists a number of measurable goals that when accomplished will form your strategy for each ministry objective. They will also serve to keep you on track and focused on your ministry tasks.

Each team needs to prioritize their goals and look for potential “short-term wins.” Determine who on the team will work through and develop each goal. Observe the deadline for the completion of the goals. You may add or subtract goals (be sure to clear this with the Lead Development Team). Use the space in front of each goal to check off completed goals and/or to prioritize the goals.

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<sup>1</sup> Adapted from Aubrey Malphurs, *Advanced Strategic Planning: A 21st-Century Model for Church and Ministry Leaders*, Kindle ed. (Baker Publishing Group, 2013), 319-325.

## Objective 1: Recruit a Lead Development Team (LDT) and begin the process.

Lead Development Team (LDT)

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

- \_\_\_ Recruit a leader/champion (could be a lay leader, staff person, or the senior pastor) over the entire development process.
- \_\_\_ The leader will recruit an assistant leader and several other team members from the SLT and congregation to assist him/her.
- \_\_\_ Assist the pastor or person responsible for recruiting the other team leaders who, in turn, will recruit their team persons.
- \_\_\_ Exercise general oversight over the development process.
- \_\_\_ Create an overall process time line and use it to coordinate the various completion dates, etc. (You may want to use a Gantt chart as your time line.)
- \_\_\_ Regularly monitor and update the time line.
- \_\_\_ Regularly communicate with each team and its leader (track progress, address problems).
- \_\_\_ Regularly assess the overall progress (the “big picture”) of the development process and keep the pastor informed of the same.
- \_\_\_ “Troubleshoot” when necessary.
- \_\_\_ Schedule and conduct the MIR (monthly implementation review) meetings.
- \_\_\_ Set up and monitor a strategic planning website.
- \_\_\_ Assemble and edit the final draft of the strategic plan (if necessary).
- \_\_\_ Regularly evaluate and seek to improve the overall development process.

## Objective 2: Pray for the development process.

Intercessory Prayer Development Team.

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

\_\_\_ Determine if such a prayer team already exists.

\_\_\_ Pray specifically for the SLT while it is meeting, usually Friday evenings and Saturday mornings.

\_\_\_ Pray for the senior pastor, staff, and SLT as they're involved in the process.

\_\_\_ Pray for the various development teams and their leaders.

\_\_\_ Pray for the congregation to accept and be involved in the process.

### Objective 3: Design a congregational communication plan.

Congregational Communication Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

\_\_\_ Draft a core values statement (credo).

\_\_\_ Decide how you will best communicate in particular your values and mission to the congregation (see “best practices” below).

\_\_\_ Regularly remind the pastor to communicate the mission and vision to the congregation.

\_\_\_ Investigate and evaluate how the church currently communicates.

\_\_\_ Apply the Communication Tool to your board meetings, staff meetings, team ministries, etc. The Communication Tool asks eight questions: what needs to be communicated, by whom, to whom, where, when, how, how often, and why?

\_\_\_ Recruit a lay or staff person who clears and coordinates what gets communicated publicly (often this is the senior pastor or chairman of the board).

\_\_\_ Determine some “best practices” for communication (website, bulletin board, bulletins, newsletters, emails, sermons, a magazine, announcements, annual congregational survey, new members class, etc.).

\_\_\_ Investigate other churches in your area that are known for good communication and find out what they are doing that would help you.

\_\_\_ Decide how best to communicate with those outside the church and design a marketing strategy to get your message to them.

\_\_\_ Draft the overall church vision statement.

\_\_\_ Decide along with the senior pastor how you will best communicate your vision in particular to the congregation.

\_\_\_ Regularly evaluate and improve your communication process.

## Objective 4: Develop a strategy to reach your community.

Community Outreach Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

- \_\_\_ Get educated about community outreach via books, podcasts, online training, etc.
- \_\_\_ Identify your Jerusalem (Acts 1:8)—set “soft” community boundaries.
- \_\_\_ Discover who lives in your community—demographics and psychographics (Community Report). Consider interviewing some of the people who are in your community.
- \_\_\_ Keep abreast of your community’s demographics and psychographics.
- \_\_\_ Identify the issues your community struggles with and how your church will address them.
- \_\_\_ Set a challenging goal (each one reach one each year, for example).
- \_\_\_ Identify some redemptive, community-specific ministries (key initial and long-term ministries that would help you reach your community).
- \_\_\_ Discover your congregation’s self-identity—how you view yourselves (missionaries, disciples, servants, witnesses, evangelists, members, etc.).
- \_\_\_ Provide evangelistic training for the congregation (a premier evangelistic training course, a gospel presentation, style of evangelism, etc.).
- \_\_\_ Identify other development teams you need to communicate with and meet or somehow connect with them periodically.
- \_\_\_ Develop a one-paragraph vision statement for community outreach.
- \_\_\_ Cast a compelling vision (once the final vision has been developed).
- \_\_\_ Develop a plan to plant church-planting churches in your Jerusalem (Acts 1:8).
- \_\_\_ When you have addressed most if not all these goals, you’ll have your strategy to accomplish community outreach. Draft a statement that will capture and communicate this strategy for community outreach, and present it to the LDT or appropriate person(s) (pastor, executive pastor, SLT, board, etc.) for evaluation, input, and final approval.
- \_\_\_ Regularly evaluate and update long term your community outreach strategy.

## Objective 5: Develop your strategy to make disciples.

Disciple-Making Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

\_\_\_ Get educated about disciple making pathways via books, podcasts, online training, etc.

\_\_\_ Identify the characteristics of a mature disciple (e.g., worship, fellowship, biblical instruction, evangelism, and service).

\_\_\_ Identify your primary ministries—“pathway for making disciples”: preaching/worship service, Bible study, small groups, etc.).

\_\_\_ Determine which characteristics are accomplished currently by each primary ministry and which aren’t.

\_\_\_ Evaluate and tweak or develop the primary ministries (your “disciple-making pathway”). (If you have time, do the same with the secondary ministries.)

\_\_\_ Create or embrace a figure or image to communicate your disciple-making strategy.

\_\_\_ Decide how you’ll measure or evaluate progress (count heads, etc.).

\_\_\_ Identify other development teams you need to communicate with. Meet or somehow connect with them periodically.

\_\_\_ Develop a one-paragraph vision statement for making disciples.

\_\_\_ When you have addressed most if not all these goals, you’ll have your strategy to accomplish disciple making. Draft a statement that will capture the church’s strategy for making disciples, and present it to the LDT or appropriate person(s) (pastor, executive pastor, SLT, board, etc.) for evaluation, input, and final approval.

\_\_\_ Regularly evaluate and update long term your disciple-making strategy.

## Objective 6: Develop a strategy to mobilize your congregation.

Mobilization Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

- \_\_\_ Get educated about lay mobilization via books, podcasts, online training, etc.
- \_\_\_ Articulate and communicate to all the importance of mobilizing your congregation (work with the Communication Development Team).
- \_\_\_ Identify the mobilization problem (not enough workers).
- \_\_\_ Determine or guess what percent of your congregation is mobilized.
- \_\_\_ Set a goal for the percent of the congregation you want to be mobilized.
- \_\_\_ Embrace and communicate the biblical solution for mobilization.
- \_\_\_ Understand and be able to explain the divine design concept.
- \_\_\_ Develop and put in place a three-phase mobilization process: discovery, consulting, and placement or something similar.
- \_\_\_ Train ministry leaders (children, youth, adults, etc.) in the mobilization process so they understand their role in the particular ministry (draft job descriptions, etc.).
- \_\_\_ Decide on the appropriate mobilization tools (gifts inventory, passion audit, temperament tool, etc.). Assess costs for these tools.
- \_\_\_ Develop a one-paragraph statement that captures and communicates your vision for church mobilization.
- \_\_\_ Identify other development teams you need to communicate with. Meet or somehow connect with them periodically.
- \_\_\_ When you have addressed most if not all these goals, you'll have your strategy to mobilize your congregation. Draft a paper that will capture the church's strategy for mobilizing its people, and present it to the LDT and appropriate person(s) (pastor, executive pastor, SLT, board, etc.) for evaluation, input, and final approval.
- \_\_\_ Regularly evaluate and update long term your congregational mobilization strategy.

## Objective 7: Develop a strategy to build a staff team.

Staffing Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

- \_\_\_ Get educated about staffing via books, podcasts, online training, etc.
- \_\_\_ Determine how many staff you should have (1 for every 150 in worship).
- \_\_\_ Address whether you have a balanced staff (functional and age-specific staff).
- \_\_\_ See that all ministry staff have a job/ministry description.
- \_\_\_ Determine if staff will primarily train lay leaders for ministry.
- \_\_\_ Determine if staff and/or trained lay leaders will equip laypersons for ministry.
- \_\_\_ Develop a staff organizational chart.
- \_\_\_ Create a staffing blueprint for recruiting future staff.
- \_\_\_ Address staff deployment (are staff in the right positions?).
- \_\_\_ Design and conduct a staff evaluation process.
- \_\_\_ Evaluate staff chemistry.
- \_\_\_ Develop a one-paragraph vision statement for building staff.
- \_\_\_ Identify other development teams you need to communicate with. Meet or somehow connect with them periodically.
- \_\_\_ When you have addressed most if not all these goals, you'll have your strategy to build your staff. Draft a paper that will capture the church's strategy for building its staff, and present it to the LDT or appropriate person(s) (pastor, executive pastor, SLT, board, etc.) for evaluation, input, and final approval.
- \_\_\_ Regularly evaluate and update long term your staff building strategy.

## Objective 8: Develop a strategy to determine your best ministry setting.

Setting Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

- \_\_\_ Get educated about ministering setting via books, podcasts, online training, etc.
- \_\_\_ Determine how best to address your location issues.
- \_\_\_ Draft a church campus master plan (architect).
- \_\_\_ Evaluate the church's "visitor friendliness" and propose corrections.
- \_\_\_ Evaluate the church's cleanliness and propose corrections.
- \_\_\_ Evaluate whether facilities are functional and propose corrections.
- \_\_\_ Identify any facility "blind spots" and propose corrections.
- \_\_\_ Evaluate current parking and propose corrections.
- \_\_\_ Evaluate seating capacity (use the 80–90% rule) and propose corrections.
- \_\_\_ Evaluate acreage (use 1 acre per 100 people) and propose corrections.
- \_\_\_ Address whether or not the church should consider a relocation.
- \_\_\_ Identify other development teams you need to communicate with. Meet or somehow connect with them periodically.
- \_\_\_ Develop a one-paragraph vision statement for setting.
- \_\_\_ When you have addressed most if not all these goals, you'll have your strategy to best determine your ministry setting. Draft a statement that will capture the church's strategy for determining its best ministry setting, and present it to the LDT or appropriate person(s) (pastor, executive pastor, SLT, board, etc.) for evaluation, input, and final approval.
- \_\_\_ Regularly evaluate and update long term your setting for ministry strategy.

## **Objective 9: Develop a strategy to evaluate and raise significant finances for ministry.**

Finances/Stewardship Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

\_\_\_ Get educated about finances and stewardship via books, podcasts, online training, etc.

\_\_\_ Determine who will lead the church in the area of stewardship or finances.

\_\_\_ Reconstruct the budget around the four major allocation areas (missions and evangelism, staff, ministries, and facilities).

\_\_\_ Determine the proper allocation (percentage) of funds to each area.

\_\_\_ Monitor and assess your current giving.

\_\_\_ Decide how you'll raise funding for ministry (review chap. 12, pp. 255–82).

\_\_\_ Consider alternative sources for funding (capital campaigns, trusts, etc.).

\_\_\_ Develop a one-paragraph vision statement for your stewardship ministry.

\_\_\_ Identify other development teams and/or committees you need to communicate with. Meet or somehow connect with them periodically.

\_\_\_ When you have addressed most if not all these goals, you'll have your strategy to evaluate and raise finances for your church. Draft a statement that will capture the church's strategy for fund-raising and present it to the LDT or appropriate person(s) (pastor, executive pastor, SLT, board, etc.) for evaluation, input, and final approval.

\_\_\_ Regularly evaluate and update long term your funding strategy.

## Objective 10: Build a creative, innovative church adapts quickly to culture change.

Creativity and Innovation Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

- \_\_\_ Determine if the church keeps up with and relates well to the culture (surveys of congregation).
- \_\_\_ Interview people within and outside the congregation and ask what you are doing that's become outdated and irrelevant. (What's not changed in the last five years?)
- \_\_\_ Develop and apply a biblical theology of change (function, form, and freedom).
- \_\_\_ Constantly challenge your views and assumptions concerning what you think is true about your community, your congregation, your ministries, your leaders, and the way you do things inside your organization. Take nothing for granted.
- \_\_\_ Develop a process for generating hundreds of new, strategic ministry ideas each year (lay, team, and staff brainstorming sessions, etc.).
- \_\_\_ Gain congregational permission to experiment with and try new things. (This means they and you will have to become comfortable with failure. However, it's far better to have tried and failed than not to have tried at all.)
- \_\_\_ Consider and evaluate creative and innovative ideas from the congregation and others.
- \_\_\_ Identify innovative and creative churches in New Zealand and discover what they are doing and how they may help you in your ministry. Visit one in your area.
- \_\_\_ Allocate funds in the budget to fund new ideas (recommend 1–5% of the ministries budget).
- \_\_\_ Read books and articles on creativity and innovation and on innovative, creative churches.
- \_\_\_ Invite new staff and new members and even outsiders to tell you what they think you need to change to be more effective as a church.

## Objective 11: Craft a process to develop leaders in the church.

Leadership Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

\_\_\_ Get educated about leadership development via books, podcasts, online training, etc.

\_\_\_ Know and be able to articulate the reasons leadership development is so important to the church.

\_\_\_ Know and be able to articulate the reasons churches are not developing leaders.

\_\_\_ Determine if you believe that leaders are born or made.

\_\_\_ Define leader development.

\_\_\_ Know Jesus' leader development phases, principles, and steps.

\_\_\_ Determine if your empowered leaders (board, staff, pastor, patriarch, etc.) will support the leader development process.

\_\_\_ Decide who will initiate, support, and lead the development process.

\_\_\_ Determine who will actually develop leaders.

\_\_\_ Arrive at a consensus definition of leadership.

\_\_\_ Identify the various leadership levels in your church.

\_\_\_ Discover and recruit new, emerging leaders for development.

\_\_\_ Deploy new leaders into their positions of leadership.

\_\_\_ Develop new and present leaders for their ministries in the church.

\_\_\_ Regularly evaluate your leadership development process.

\_\_\_ Consistently reward those in the leadership development process.

\_\_\_ Identify other development teams you need to communicate with. Meet or somehow connect with them periodically.

\_\_\_ Develop a one-paragraph vision statement for leader development.

- \_\_\_ When you have addressed most if not all these goals, you'll have your process for developing leaders in your church. Draft a statement that will capture the leader development process, and present it to the LDT or appropriate person(s) (pastor, executive pastor, SLT, board, etc.) for evaluation, input, and final approval.
  
- \_\_\_ Regularly evaluate and update long term your leader development strategy.

## Objective 12: Develop a strategy that equips the board for leadership excellence.

Board Strategy Development Team

Completion date: \_\_\_\_\_

Team leader: \_\_\_\_\_

Team members: \_\_\_\_\_

\_\_\_ Get educated about elder board development via books, podcasts, online training, etc.

\_\_\_ Define your governing board.

\_\_\_ Evaluate current board performance.

\_\_\_ Limit the board's size to nine people or less.

\_\_\_ Determine the spiritual qualifications for the board.

\_\_\_ Determine the relationship between the board, pastor, and staff.

\_\_\_ Evaluate and establish clear board functions (what it does).

\_\_\_ Review and set the composition of the board.

\_\_\_ Identify the characteristics of a healthy board.

\_\_\_ Establish guidelines with the pastor and board for power checks and balances.

\_\_\_ Implement a church policies approach.

\_\_\_ Set up an orientation and training process for new board members.

\_\_\_ Identify other development teams you need to communicate with. Meet or somehow connect with them periodically.

\_\_\_ Develop a one-paragraph vision statement for the board.

\_\_\_ When you have addressed most if not all these goals, you'll have your strategy to equip your board for leadership excellence. Draft a statement that will capture the church's strategy for board excellence, and present it to the LDT or appropriate person(s) (pastor, executive pastor, SLT, board, etc.) for evaluation, input, and final approval.

\_\_\_ Regularly evaluate and update long term your board development strategy.