

STRATEGIC PLANNING WORKSHEET¹

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.

¹ 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.