
EFFECTIVE STEWARDSHIP
STARTS WITH YOUR
STRATEGIC PLAN



Over many years of working with churches and ministries on fundraising projects, I've come to deeply appreciate how important an organization's strategic plan is to those efforts. In this article, I've asked my colleague Mike Meyers to share his streamlined, simple advice for church strategic planning. Whether you have a plan in place or just know you need one, you'll find helpful guidance on the role that living document should play in your stewardship program and across your ministries.

- TIMOTHY L. SMITH

Before you develop your new stewardship campaign, before you revamp your member materials, and long before you consider launching a capital campaign, first be sure your church's strategic plan embodies who you are and your congregation's unique goals.

Pastors, even if you have a strategic plan in place, this article will help you evaluate and refresh your current plan. Whether you're starting from scratch or just doing a refresh, the process doesn't have to be daunting or overwhelming for you or your board and staff. In this article, we'll give you the tools to produce a simple, straightforward strategic plan.

I'm a firm believer in 'less is more' when it comes to these plans, so this is easy-to-use guidance that will give you a concrete strategic plan in three pages or fewer. It's the quality of time you spend - not the length of the final document - that will shape your church's mission, membership and development work going forward.





VALUES, VISION AND PURPOSE

The process should always start with your values, vision and purpose as a church.

Values describe who you are and become the filters for your decision making. These values can be short statements with the key attributes of your particular congregation. Try to keep it to 3-5 key concepts that really fit your mission.

Vision is the why. Why does this church exist and what do we want to do as a church that will be our legacy? This is most often just a sentence that captures who we want to be as a congregation with the big idea about what our future looks like.

Purpose. This is a description of what drives our work. What is our church's purpose each and every day?

Pastors, invest the time to really work on these three components, because they truly drive everything else. They should last for several years, if not longer, as the foundational elements of your strategic plan. These statements will be the guideposts for discernment and decisions about everything with your congregation going forward, including donor relations and stewardship.

But no one reads a 60-page strategic plan, so keep each component as brief as possible. The values, vision and purpose should be short enough that they're something people will easily remember. Some churches put them in their buildings, on the walls, or front and center of their printed and digital materials.

STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

The next step in the process is to conduct an analysis of your church's strategic opportunities. This is most often called a SWOT (strengths, weaknesses, threats, opportunities) analysis and it's a terrific tool that people are familiar with. I've learned the hard way that if you don't involve a broad range of people in the planning process, you will not have buy-in for the final product. Your volunteers, donors, and members need to see their fingerprints on the plan. Yes, it takes more time, but it will be well worth it in how invested your members become.

Begin with questions about key areas of your church. Pastors, give participants the opportunity to share about what they feel are organizational strengths. What are we really good at doing? Then, on the flip side, what are we not-as-good at? The "S" and "W" look internally.

Next, dive into the "O" and "T." These are external facing questions. What opportunities is the surrounding community, culture, and environment creating for us? A ridiculous example: *There's a worldwide pandemic coming soon, so we should be sure we put technology in place to be able to reach people at home with services and for online meetings or working remotely.* Wouldn't it have been nice to see that threat coming? Focus on the external factors, demographic changes or trends that may affect your church and its ministries, properties, or staff. Flag those factors that could create an opportunity or a threat to how you function. Take some time to discuss which factors make sense to prepare or adjust for, and which are nice to know but won't require any pivoting.

You will want a broad response and engagement for the SWOT conversations. An organization will want to seek feedback from the leadership team, from the middle management and a few that are up-and-coming leaders or in charge of key areas or ministries. A church should gather feedback from all of the staff. If you are a very large church with multiple campuses and staff, you may want to determine how to best collect that information and then streamline and summarize it. Pastors, your board's feedback will be important, and lastly, ask for feedback from a handful of trusted donors or long-time church members: people who know you and your ministry well.

Again, this process should be enlightening and energizing as people get focused in conversation about what the church does well and what the future holds. This is a great opportunity to truly engage with your congregation through the planning.

CRAFTING YOUR PRIORITIES

Once you have gathered all of the information in whatever survey form you have chosen, you get to begin the fun part! Begin sorting the feedback into similar clumps of comments. If five people said “music is the best part of our church,” put those comments together in a working document. You’ll want to start identifying themes in the SWOT feedback that will eventually lead to 3-5 priorities for the strategic plan.

In my experience, the best way to accomplish this step is to go off site for uninterrupted time with the key strategy team, which should include the main leaders, and work through the feedback together. This dedicated, cloistered time is important both to getting the work done in a collaborative way, but it also strengthens the team and its commitment to the plan.

Once you have grouped together the similar comments, some themes should appear naturally. Then the group needs to do some critical thinking, identifying and arguing for the main needs moving forward. What areas should you improve? What should you quit doing? What opportunities should you engage? Everyone should have a voice in this process, so avoid allowing just one leader to dominate the discussion.

Examples of categories that may emerge might be: revenue production, building technology systems, starting a new part of the ministry to address an external need, or taking care of our current staff. The goal is to arrive at 3-5 main areas of focus for your strategic plan. These are the key areas of focus for the length of the plan (usually 3-4 years). In today's world, it's tough to build a 10-year strategic plan.

Work together until you have that set of priorities identified. They will be the basis for the last step, which is setting goals under each priority of the plan.





ESTABLISHING YOUR GOALS

Now that you have the areas that you want to focus on for the next several years, the next step is to put measurable goals in place. Each goal should have a measurable outcome, date of completion and a way to measure progress and success against it.

Some of your priorities may only need one or two measurable goals. Others may need many. There is not a specific number of goals to strive for - simply do what is necessary to achieve each priority you've identified.

Take the time to write clear goals and specific outcomes with deadlines. A poorly stated goal would be "Establish remote communications systems for the church." Well stated of the same goal: "Implement a system for remote team communication by 4/26/24." Or another example of a concrete goal: "Increase annual giving revenue by 7% each year through 2027." Once the goals are established, assign someone to be accountable/lead staff for each.

Unite your values, vision and purpose components with the strategic plan priorities and goals in a three-page document. There is nothing magic about three pages, but having that as a goal will force you to keep it tightly focused. Again, don't create a long strategic plan that no one will use. Long plans have a greater tendency to go on the shelf. Having a three-page plan on everyone's desk and every conference table is a good way to let people know you are committed to the plan and process. Pastors, I'd encourage you to give this plan visibility in your internal or external meetings and in your communications. It will help it be what guides your (small and large) decisions for the next several years.

Your strategic plan is the filter you will use to make decisions about everything from budget items to donor asks and ministry-specific decisions. Don't launch a campaign - or even a stewardship drive - without it.

Enjoy the process! It's a tremendous chance to talk about the unique character of your church, its mission and its future with your donors, volunteers and members.

- MIKE MEYERS

ABOUT MIKE MEYERS

A Nonprofit DNA partner, Mike Meyers has more than 20 years of nonprofit experience in fundraising and leadership within organizations and as a consultant. He has served in the role of Chief Development Officer for three large nonprofits and also served as CEO of Food for the Hungry, where he led global strategic planning. Mike has been involved in nonprofit work in more than 60 countries and led fundraising efforts on six continents.



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