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# Strategic Planning Timeline

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To produce the best results, your congregation’s strategic planning process needs to be tailored to its unique needs and objectives. This document will give an idea of how an 18-month strategic planning process would usually go, to help you to decide whether this approach to planning is right for your congregation at this time. It may also help with the decision whether or not to engage a consultant.

The margins reference relevant sections of *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations* (H.C.). Before deciding what kind of planning process to use, leaders should study chapters 1–2. This outline is based on the “Full Planning Process” summarized in chapter 3.

An important question to ask early is, “After we have a plan, who will be responsible for approving and implementing it?” In most congregations, the governing board and clergy leader share this responsibility, but without a good process for policymaking, goal-setting, delegation of authority, and accountability, there is a risk that a good plan will stall at the implementation stage. It is not necessary to be 100% clear about this initially, but it needs to be on the agenda so that the planning process can produce results after (or even before) the report is published. My book *Governance and Ministry: Rethinking Board Leadership* (Alban 2009) provides a comprehensive guide to strengthening the partnership of board and staff.

This process assumes a Planning Team. In some smaller congregations, it makes sense for the governing board to serve as the planning team. In every congregation, the planning team needs to keep in regular touch with the governing board to ensure their support of the final result. The chief of staff—usually the top clergy leader—should serve as an active member of the planning team.

A good way to select a Planning Team is for the board and senior staff to hold a workshop meeting where they name some of the major themes and questions to be addressed in planning, identify the qualities needed in Planning Team members, and anticipate the process for approving and implementing a strategic plan. After the workshop, the list of qualities needed in a planning team is sent to board members with instructions to come to the next meeting with nominees in mind. All nominations are listed, and the board will choose a planning team of 5-7 members, including the senior clergy leader. Proposed members are contacted, advised of the process by which they were chosen and the scope of the work, and asked to serve.

Once the planning team is in place, the major steps of the process proceed according to the particular needs of each congregation. As a starting point, I have provided the following outline, with time estimates and page references to *Holy Conversations*.

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## Phase I: Planning to Plan

<b>Months 1–3</b>	Consultant requests and studies written information about the congregation and its work and schedules a first on-site visit, preferably including an opportunity to observe and participate weekend worship and education programs, and to interview individuals
<b>H.C. 2, 4</b>	

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and groups as agreed.

During the first visit, Consultant facilitates a Planning Team retreat for a day and a half for team-building and tone-setting exercises, including spiritual components developed with the clergy leader. The team reviews key strategic planning concepts and learns plans the process itself. Outcomes of the retreat include:

- A list of Driving Questions to be addressed by the process. Driving Questions are a congregation's focused versions of such larger planning questions as Who are we? What are we called to be or to do? Who is our neighbor?
- A scriptural theme or other symbolic focus to be used throughout the process, if the Planning Team wishes.
- A timeline and schedule of events for the process. The plan will include both internal and external data gathering and ways of involving the governing board, staff, wider circle of lay leaders, and congregation.
- An organizational plan including Working Groups to carry out parts of the process under the direction of the Planning Team. One key Working Group that should be identified early is the Writing Team of 1-3 people who will draft the planning report itself.
- Commitments from team members to lead parts of the process.

After the retreat, Planning Team meets with the governing board, and senior staff to present the proposed planning process for input and revision. Based on feedback, the team refines its list of Driving Questions for endorsement at an official board meeting.

The consultant prepares a written report with his analysis of the data he has been provided and first impressions based on the visit, including suggestions about next steps in the planning process.

## Phase II: Data Gathering and Holy Conversation

**Months 4–9**

**H.C. 3, 5, 9, 10,  
11, 13, and  
Appendix**

The shape of this phase of the process will be determined by the plans made at the initial retreat, with adjustments in response to changing circumstances. The Planning Team persists in its chosen spiritual practices and maintains focus on the Driving Questions. Some of the most common activities in this phase include:

- Working Groups, such as those for the cottage meetings, congregational survey, external data collection, program areas, and affinity groups implement data collection related to the Driving Questions.
- Events for all or part of the congregation. These events may include teaching on particular topics, facilitation of challenging conversations, or leadership skill training. In larger congregations, a Wider Circle of Leaders (60-80 people) may be especially invited to attend a series of events.
- For example, one large event that is almost always helpful is an evening of historical reflection for the whole congregation. Purpose: to engage congregants in thinking about what has been of most value to them in the past, and to provide the produce a list of "core values" of the congregation.

- Video interviews with a cross-section of congregants can be a helpful way of dramatizing and strengthening the congregation’s emerging identity. Large events (or many small ones) give the chance for congregants to reflect together on the testimonies of a few.
- A demographic study can help to correct misimpressions and increase understanding of environmental changes that affect the congregation. A well-prepared session open to all interested members of the congregation (often facilitated by the consultant) can spark useful conversation about fresh ways to connect the congregation’s faith with a changing context.

This list only begins to scratch the surface of what is possible. A planning process that does not produce at least one original idea for this list would be a disappointment!

Representatives of the Planning Team meet regularly with the governing board to engage them in reflecting on particularly challenging questions that have arisen in the course of the process.

### Phase III: Creating the Plan

**Month 10–13**

The Planning Team meets for 1.5 days to review data from questionnaires, interviews, cottage meetings, and the all-congregation events, draw out key insights for the plan, develop a list of potential goals, and identify further research that needs to be done, if any. A key outcome of this retreat is a draft planning report outline to be fleshed out by the Writing Team after the retreat.

The Planning Team, Writing Team, and clergy leader, meet with the governing board to review the planning report outline and receive feedback.

The Writing Team drafts the planning report, consulting occasionally with the Planning Team.

The governing board and staff meet to develop an implementation plan with timelines, budgets, and benchmarks. This is where a good conversation ahead of time about who will be responsible for approving and implementing the plan pays off.

The Planning Team presents its report to the Board and congregation.

### Phase IV: Implementing the Plan

**Months 14-18**

Periodic meetings of top leadership and task groups focused on the plan track and evaluate the implementation process and shore it up as needed. One of these checkup meetings features an evaluation of the planning process with the planning team, clergy leader, and governing board. The Planning Team disbands with appropriate thanks and responsibility for implementation passes entirely to the governing board and staff leaders.