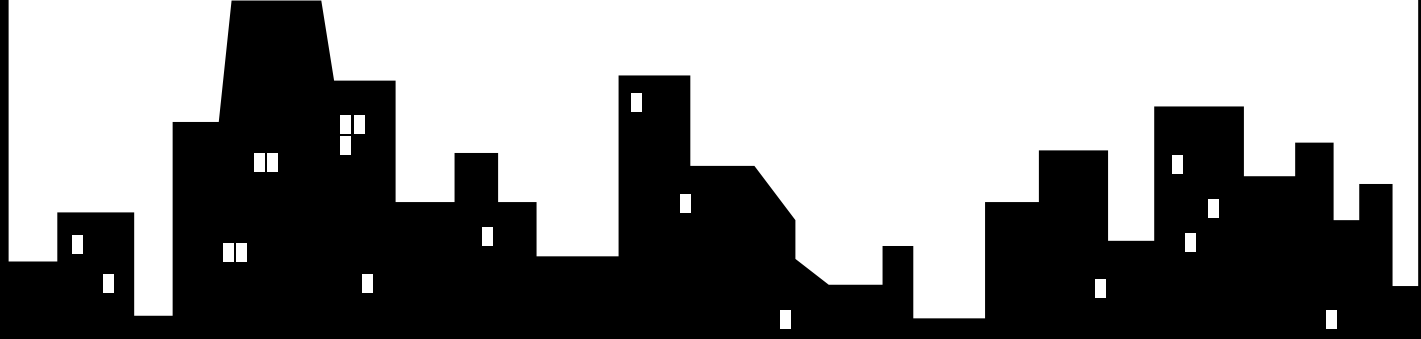


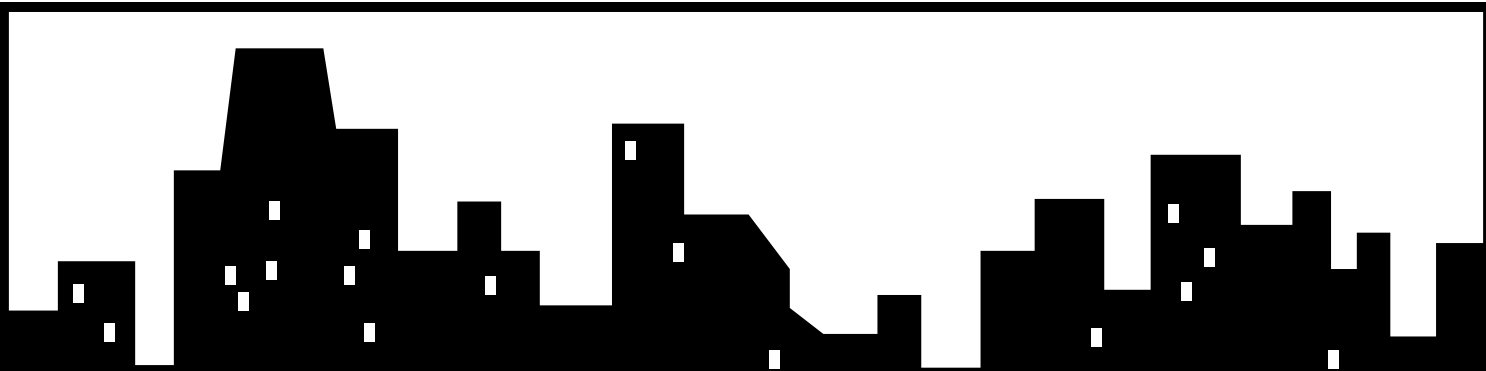
STRATEGIC PLANNER'S TOOLKIT

*A Workbook for Leaders of Smaller Churches,
New Church Plants, Departments, Missions, Task Forces,
or Christian Service Organizations*



*A Practical Process For Transforming
Your Vision Into Effective Action*

Ron Ford with Bill Bean



INTRODUCING **THE STRATEGIC PLANNER'S TOOLKIT**

Leaders of Christian organizations at all stages of development can utilize the principles and processes of strategic planning to turn their visions into action.

In the Strategic Planner's Toolkit you will find:

- ✓ A complete process that addresses all of the issues that need to be included in your strategic plan. You will work through the issues of Where you want to go, Where you are now, What needs to be done next, and who is going to do what by when.
- ✓ Easy to use worksheets and exercises.
- ✓ A comprehensive examination of the strategic needs and opportunities of the organization.
- ✓ 3 different planning paths to choose from.
You can follow the *Comprehensive* path for an in-depth planning experience, or you can choose the *Quick Start* path if you need a fast way to build a good set of goals and action plans. You can always revisit the exercises you skipped when you have more time. Or you can use the *Start Up* path for developing plans for new organizations. Use this path if you are starting a new church or ministry.
- ✓ Writing Tips and Hints along the way make it even easier to work through the process.
- ✓ A thorough implementation system to insure that what you plan gets done.

STRATEGIC RESOURCES Our mission is to help Christian leaders transform their personal and corporate visions into effective action. We provide resources, training and team-based planning facilitation for leadership and management teams that serve to optimize their potential and accelerate their growth.

RON FORD A veteran church planter, pastor, and consultant with churches, not-for-profit organizations and businesses, Ron established Strategic Resources in 1993.

STRATEGIC PLANNER'S TOOLKIT

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List of Exercises and Worksheets

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STEP 1: MINISTRY PROFILE (pp. 24-31)		
Exercise A: Ministry Profile Definition (p. 25)		
<i>Worksheet 1: Ministry Profile Definition, (pp. 25-28)</i>	__/__/__	☐
Exercise B: Ministry Profile Statement (p.29)		
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 STEP 2: LONG-RANGE VISION (pp. 32-38)		
Exercise A: Long-range Vision Milestones (p. 33)		
<i>Worksheet 3: Long-range Vision Milestones, (pp. 34-35)</i>	__/__/__	☐
Exercise B: Long-range Vision Statement (p. 36)		
<i>Worksheet 4: Long-range Vision Statement, (p. 37)</i>	__/__/__	☐
 STEP 3: VALUES STRUCTURE (pp. 39-51)		
Exercise A: Values Prioritization (p. 40)		
<i>Worksheet 5: Values Prioritization, (p. 41)</i>	__/__/__	☐
Exercise B: Values Classification (p. 42)		
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Exercise C: Values Matrix (p. 47)		
<i>Worksheet 8: Values Matrix, (p. 50)</i>	__/__/__	☐

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	Scheduled	Completed
STEP 4: MISSION STATEMENT (pp. 52-56)		
Exercise : Mission Statement (p. 52)		
Worksheet 9: Mission Statement, (pp. 54-56)	__/__/__	☐
STEP 5: STRATEGIC ENTERPRISE ASSESSMENT (pp. 57-79)		
Exercise: Strategic Enterprise Assessment (p. 57)		
Worksheet 10: SEA Exercise, (pp. 64-79)	__/__/__	☐
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STEP 7: STRATEGIC GOAL IDENTIFICATION (pp. 93-118)		
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Worksheet 13: Goal Prioritization, (pp. 114-118)	__/__/__	☐

ACKNOWLEDGMENTS

I wish to acknowledge the tremendous influence and encouragement that I have received from my friend and business associate, Mr. William C. Bean. As a dear brother in Christ, his shared zeal for the welfare of the Body of Christ has served to strengthen my own ambitions to be an effective servant of God's purposes through the church. Bill is an expert in the development and application of strategic planning to business organizations. His work and counsel have been a foundation upon which I am seeking to build for the sake of the Kingdom. My goal has been to apply this very effective and innovative approach to strategic planning to the Christian settings of the local congregation and other nonprofit ministry organizations.

Ron Ford
Bakersfield, California
March 1995

Strategic Planner's Toolkit

Written by Ron Ford and Bill Bean

Produced by Ron Ford.

Copywrite March, 1995

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Strategic Resources is a company committed to helping Christian leaders in business and ministry organizations transform their corporate visions into effective action. We provide resources, training and strategic planning facilitation for leadership and management teams that serves to optimize their potential and accelerate their growth.

STRATEGIC PLANNER'S TOOLKIT

INTRODUCTION

WHAT YOUR ORGANIZATION NEEDS

Focused planning is a pressing need in Christian organizations today. Planning coupled with disciplined action often seems beyond reach. The press of daily demands, unexpected crises and volatile situations may keep leaders so consumed with running the ministry that there is little time or thought given to planning. Added to this operational reality is the common perception that strategic planning is an executive adventure, reserved for those ministries large enough to afford the amounts of time and money needed to produce five-year strategic plans. Even with all of this expense, many of these plans may end up on a shelf, never to be seriously considered again.

Yet effectiveness in strategic thinking and planning are critical to success in ministry and life. Strategic effectiveness is achieved by setting the right long-term priorities and implementing them. A Christian organization produces strategic effectiveness when it directly and forcefully implements prioritized goals in its operations.

So how does the leader of a Christian organization develop the kind of strategic capabilities needed to lead the enterprise to greater effectiveness and success? The *Strategic Planner's Toolkit** is designed to meet this need. The set of tools contained in this workbook will help you to work through the priority issues which are foundational to the development of an effective and comprehensive ministry strategy for your organization.

WHO SHOULD USE THE SP TOOLKIT?

The ***SP Toolkit*** is designed for individuals who are responsible for the development of the basic strategy and ministry plan for their enterprise. In many cases, the responsible party will be the organization's executive, but it could also be a department head, a task group leader, or the director of a ministry area. This workbook is intended for use by the planner who is working alone on the planning process rather than with a management team or group. The exercises and worksheets contained in this volume have been designed so that you can work through the priority issues one step at a time (see process diagram on page 17). This will enable you to build a comprehensive operational and strategic plan for your church, group or Christian organization. Although the planning process has been designed for a solo application, it can be even more effective with the input of others in the organization.

* Hereafter referred to as the ***SP Toolkit***.

WHAT IS STRATEGIC PLANNING?

There are many esoteric or long-winded definitions for the term *strategic planning*. Many leaders, however, are neither esoteric nor long-winded. Consequently, these definitions are frequently less than helpful. To be useful, strategic planning must be a clear and simple process. Becoming skilled at the practice of strategic planning requires that the concept be clear and easily grasped.

Here is the definition of strategic planning used in the SP Toolkit:

**THE PROCESS OF DETERMINING
YOUR LONG-TERM VISION AND GOALS
AND HOW TO FULFILL THEM.**

Although this definition is simple in terms of grammar and vocabulary, it is not simplistic. Packed into these few words are powerful concepts and insights into a process that can transform your organization.

- ☞ *It is an ongoing **process**, a way of life, rather than an “event.”*
Strategic planning should be a continual activity in a growing entity. It is often treated like an event that, once completed, no longer serves a relevant role in the ongoing operations of the organization.
- ☞ *This process **determines** what happens in the organization; it is proactive.*
Planning, not circumstances, should drive the organization, yet this is often not the case. Good planning not only keeps you on track, but it also enables you to be ready to respond to unexpected opportunities that present themselves.
- ☞ *The energies and resources of the ministry are clearly focused on a target: your **vision**.*
It is risky and ill-advised to define specific organizational goals without first determining where you want the enterprise to end up. By *vision*, we mean the overarching, all-encompassing sense of identity and direction of the enterprise.

- ☞ *Goals are the strategic opportunities at hand for the organization.*

When addressed by the organization, these opportunities will leverage the organization's resources to achieve desired ministry and financial results. That translates directly into improvement in the bottom line.

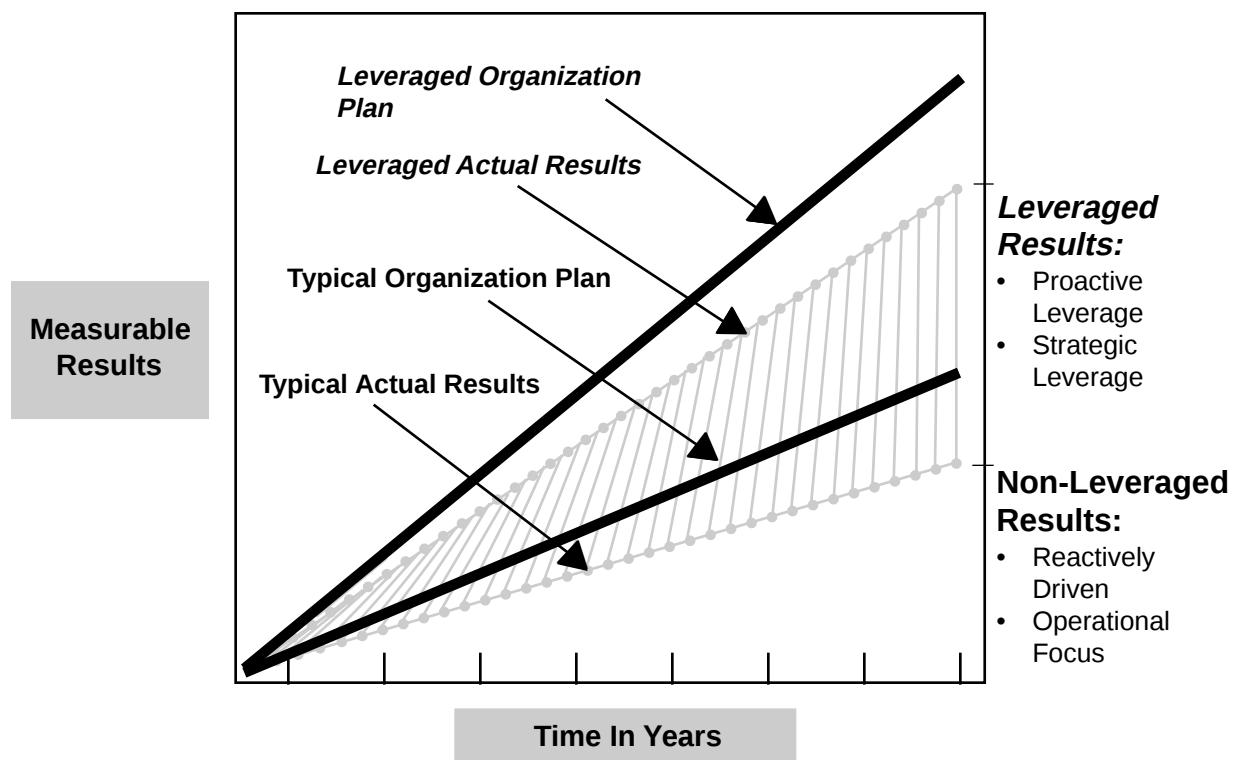
- ☞ *It is an intensely practical and pragmatic process of action which **fulfills** your goals.*

The "how to fulfill" part of the plan is often overlooked by planners. It is assumed that this will be addressed later or by someone else. Such an assumption usually translates into "nobody" ever gets around to doing "anything" with the plan. The **SP Toolkit** is designed to lead you all the way to effective implementation.

WHY IS STRATEGIC PLANNING IMPORTANT?

The ultimate result of strategic, proactive thinking is greater leverage. Those enterprises that achieve strategic leverage will be far more likely to accelerate the **rate** (the upward extent or quantitative increase) and **timing** (the quickness with which it happens) of their success.

The Impact of the Strategic Planner's Toolkit Planning Process



Of course, talking about strategic leverage is easier than achieving it. Not accomplished casually, strategic leverage must utilize a clear, practical methodology, system, or process. This workbook will lead you through a planning process that will enable you to find strategic leverage for your enterprise.

THE STRATEGIC PLANNER'S TOOLKIT PROCESS OVERVIEW

As you advance through this workbook, you will be led to address each of the five primary elements of the strategic planning process (defined below and illustrated on page 12). This will be accomplished as you work in each of four phases of the **SP Toolkit** process (illustrated on pages 13 and 14). The **SP Toolkit** is carefully designed to lead you step by step through this journey of strategic discovery.

5 KEY ELEMENTS IN THE DEVELOPMENT OF YOUR STRATEGIC PLAN

Element 1 VISION

The role of *vision* is infinitely more powerful than the average leader realizes. Vision pulls us toward the future with an image of what that future could look like. It gives us a compelling reason for the sacrifice and effort needed to accomplish something significant.

Element 2 VALUES

The *values* which are held individually and corporately are primary sources of motivation in the enterprise. Priorities and activities that do not reflect our values are easily procrastinated, compromised, and even abandoned. Values drive us and empower us for accomplishment.

Element 3 THE PRESENT

Every determined step toward the future, no matter how bright and promising it appears, must always begin upon the ground of the present. Present realities must be understood and considered as future planning takes shape in your thinking.

Element 4 MISSION

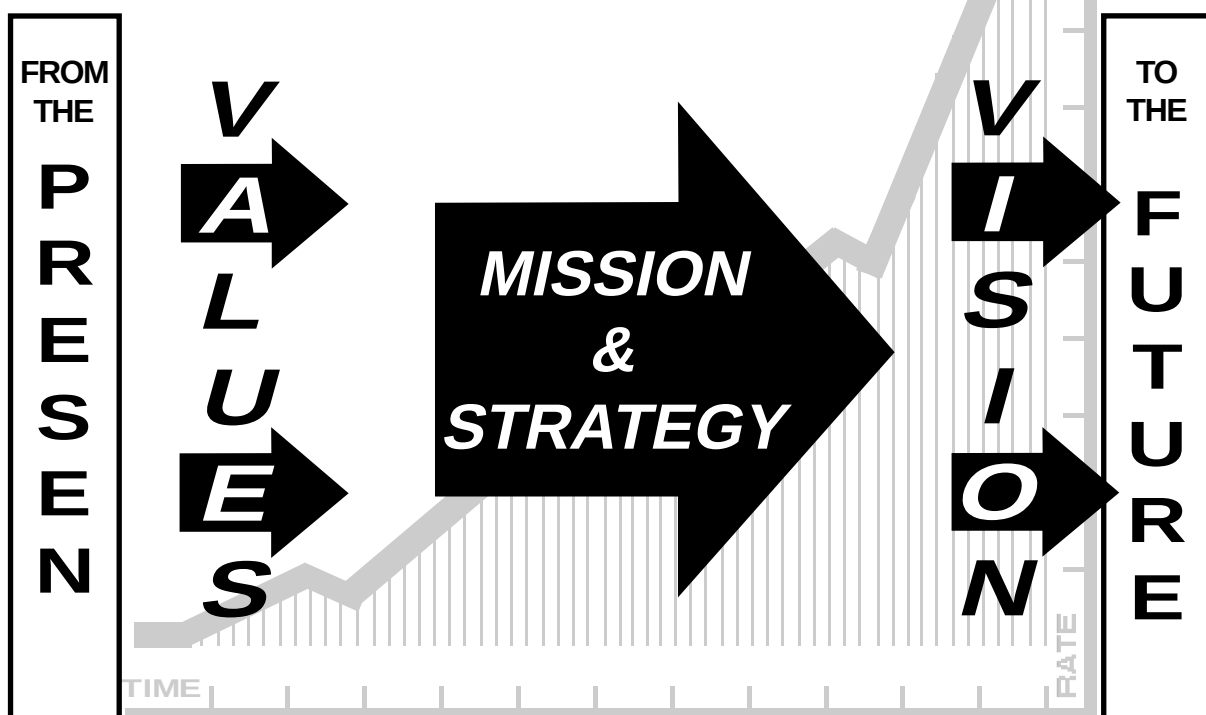
The *mission* of the organization is the tactical and operational focus for the ministry's resources and efforts. While vision concerns what you are ultimately seeking to build in the organization, mission is more concerned with the actual ministry activities in which you will be engaging in the immediate and short-range future.

Element 5 STRATEGY

With all of the above in view and in proper perspective, a careful, comprehensive plan can be developed. This will consist of priority actions, which will leverage corporate resources and opportunities, and

5 KEY ELEMENTS IN THE DEVELOPMENT OF YOUR STRATEGIC PLAN

*THE MOVEMENT FROM THE PRESENT YOU INHABIT
TO THE FUTURE YOU VISUALIZE*



The Five Elements

- 1 A **Vision** that pulls you forward
- 2 **Values** that drive you forward
- 3 The **Present** as the context in which the plan is built
- 4 A clear **Mission** as the definition of the your primary activity
- 5 A **Strategy** as the priority steps you will take to move from the present toward the vision of the future, guided by the organization's values and focused by its mission

DESIGNED AND CREATED BY RON FORD, 1994

accountable assignments which will ensure that the plan gets done.

4 PHASES IN THE STRATEGIC PLANNER'S TOOLKIT PROCESS

1

ESTABLISHING A STRATEGIC PERSPECTIVE ON THE ORGANIZATION

In Phase One you are asking three questions: **Who** are we? **Where** are we? **Why** are we? To use the analogy of a journey, your purpose in Phase One is to perform the necessary preparations before launching on the long strategic expedition.

Your primary task in this phase: Seeing where you are and where you want to be in the future.

2

DEFINING THE STRATEGIC OPPORTUNITIES FOR THE ORGANIZATION

In Phase Two the central question is “**What** should we do to fulfill our vision and mission?” In this phase you will identify the opportunities that you want to consider.

Your primary task in this phase: Identifying the strategic goals of the enterprise.

3

DEVELOPING STRATEGIC ACTION PLANS TO BE DONE

This phase builds on the work of Phase Two by taking the planning process deeply into the practical realm. Phase Three focuses the entire plan on very specific, measurable, person-responsible, time-bounded actions that serve as the critical success factors of the entire plan.

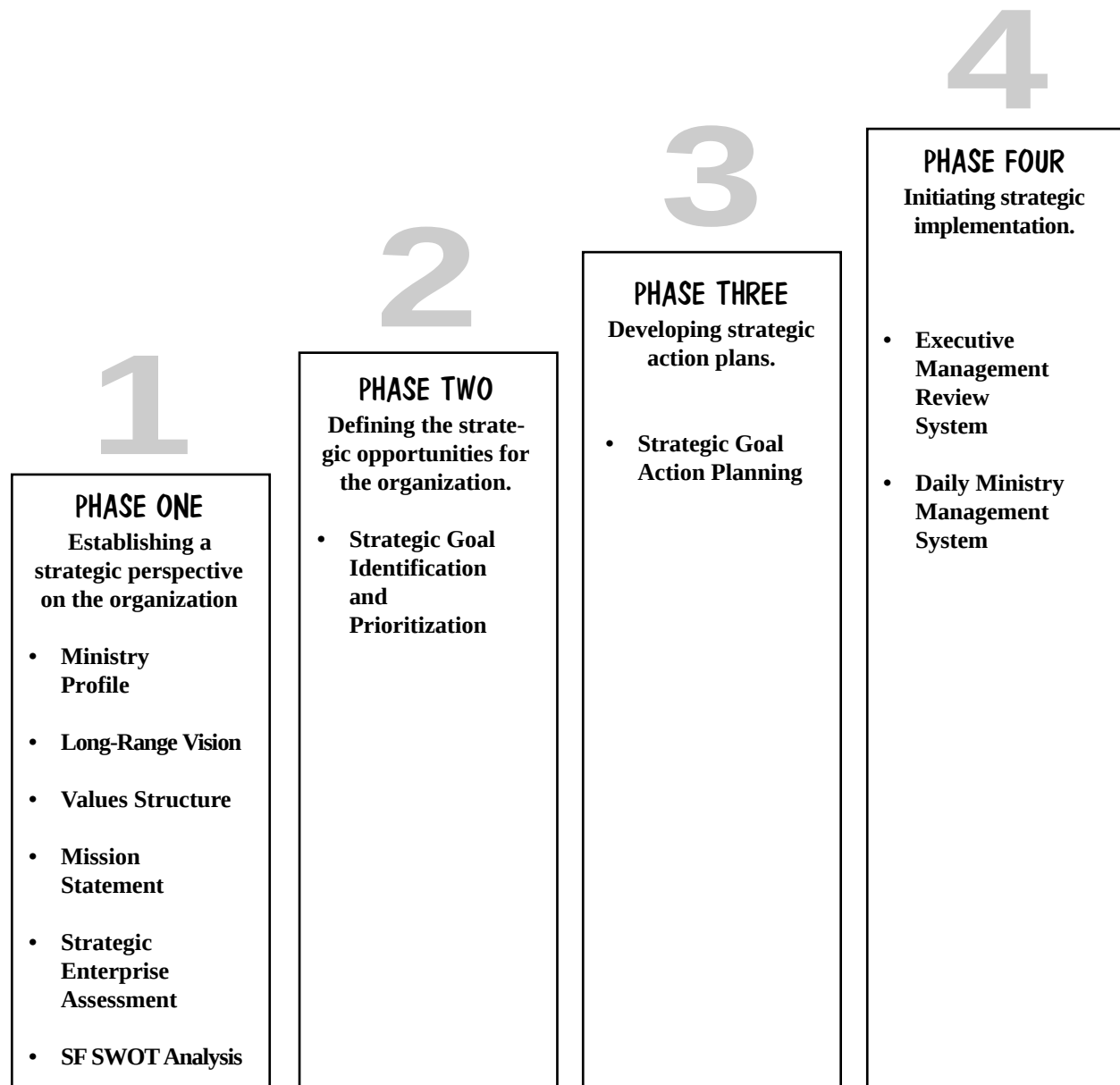
Your primary task in this phase: Assigning “who” will get “what” done by “when.”

4

INITIATING STRATEGIC IMPLEMENTATION OF THE PLAN.

Phase Four asks the critical question: “**How** can we ensure that now we have planned our work, we will successfully work our plan?”

Your primary task in this phase: Successfully managing the implementation of your plan.

4 PHASES IN THE STRATEGIC PLANNER'S TOOLKIT PROCESS

HOW TO USE THIS WORKBOOK IN YOUR ORGANIZATION

The **SP Toolkit** has been designed to allow you to work easily through the critical issues involved in building your strategy. Don't let its simplicity fool you. This will be a very thorough and comprehensive planning approach touching all of the priority issues involved in developing an effective strategic ministry and operational plan. The **SP Toolkit** will lead you through a series of steps which will involve exercises to complete.

To accommodate the differing needs of various organizations, the **SP Toolkit** allows you to choose between three optional planning paths. Step-by-step instructions will guide you through the workbook.



Quick Start Path The *Quick Start* path is for those leaders who need to economize time and energy and want to generate as comprehensive a set of goals and actions for the enterprise as possible in the shortest amount of time. The *Quick Start* version of this planning process will let you work through the core issues of the process. At a later point, when you have more time, you will benefit from returning to the exercises you skipped.



Start Up Path The second option is a *Start Up* path designed to new organizations that need to develop plans for initiating and launching their work. It is suited for use by church planters, those developing a new ministry or department within an existing church or para-church organization, or other types of start up situations.

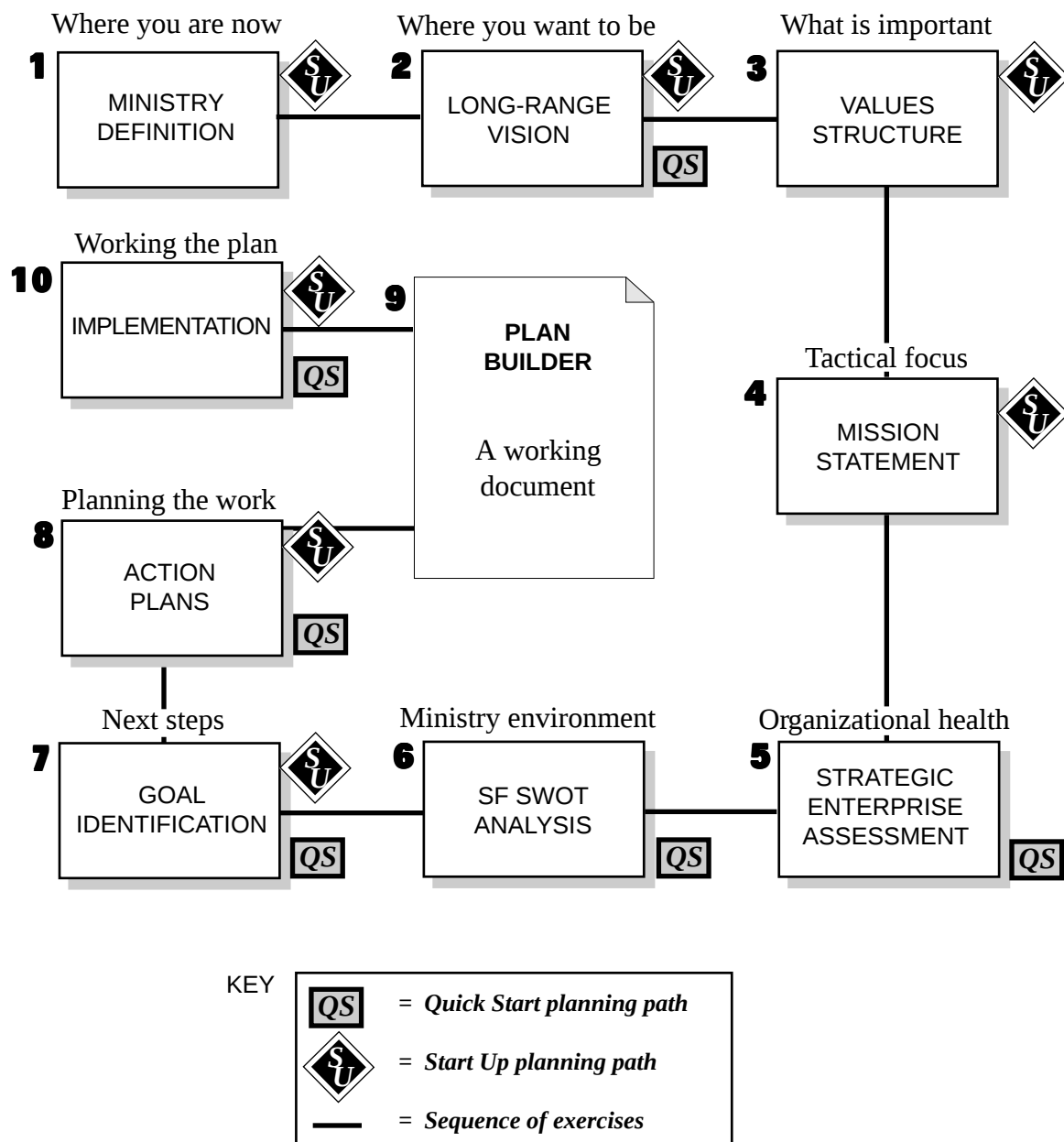
Comprehensive Path The comprehensive path allows you to maximize the quality and clarity of your plan by increasing the scope of the discovery process involved in the **SP Toolkit**. To follow the comprehensive path, complete all of the exercises in the sequence in which they are presented in the workbook.



It is important that you schedule time to work through this workbook. It will probably take you several hours to complete, and a lot of things will be competing for your time. One of the most common reasons for people failing to plan is that they do not make room for it in their schedules. There are many ways to approach making time for this planning process. An ideal situation would be to take an entire day to work through the workbook. Or you might schedule blocks of time out of your weekly schedule (for example, an hour or two a day) at a time when things are least hectic for you. The important thing is that you take time to plan. Otherwise, this workbook will sit on your shelf and not benefit you at all.

STRATEGIC PLANNER'S TOOLKIT FLOW CHART

The planning process embodied in the **SP Toolkit** involves a series of 10 consecutive steps. The following flow chart graphically illustrates this process.



STRATEGIC PLANNER'S TOOLKIT OPTIONS CHART

The following chart illustrates which steps in the *SP Toolkit* process are used by each of the three planning path options.

<i>SP Toolkit</i> Chapter	<i>SP Toolkit</i> Steps/Addenda	<i>SP Toolkit</i> Planning Path Options		
				Compr. Path
Phase One	1. Ministry Definition		✓	✓
	2. Long-range Vision	✓	✓	✓
	3. Values Structure		✓	✓
	4. Mission Statement		✓	✓
	5. SEA	✓		✓
	6. SF SWOT Analysis	✓		✓
Phase Two	7. Goal Identification	✓	✓	✓
Phase Three	8. Action Plans	✓	✓	✓
Phase Four	10. Implementation	✓	✓	✓
Addenda	A. Demographic Analysis		✓	
	B. Measurable Objectives		✓	✓
	C. Daily Ministry Management System	✓	✓	✓
	D. Ministry Process Analysis			✓
	E. Programs and Services Assessment			✓
Note: Step 9 (the Plan Builder) is integrated into <i>SP Toolkit</i> process along the way and does not stand as a separate step by itself.				

Introducing the *Plan Builder*

A special feature of this workbook is the section entitled “Plan Builder” (pp.123-156). This is a unique approach to helping you develop a plan that you can effectively implement and manage. As you work through the four phases of the ***SP Toolkit*** planning process, you will complete exercises and then incorporate the results into the “Plan Builder.” In this way, you will document the plan building process and, at the same time, build a coherent document that you can use as your master plan and a major management tool when you put the plan into action.

Phase One Work

If you are completing a comprehensive planning process, you will work through all of the first six steps of the process in this first phase of the ***SP Toolkit***. This phase appears as steps 1-6 on the process flow chart (see page 17). First you will build a basic definition of the ministry you are now in or, if you are a start up, of the ministry you will be in. This sounds self evident, but you may find it very helpful to begin with clear definitions of what you are and are not as an enterprise. Next, you will look at the future you hope for. Milestones will be identified, and a Vision Statement will be written. This will help you to discern accurately the most appropriate organization and ministry strategies to develop based upon where you want to go. A clear vision is also helpful to keep you on track in the future, as you battle your way through the inevitable firefight of ministry activity. You will clarify the values structure that is a fundamental motivating dynamic within your organization. Like wind in the sails, this is a powerful force that your plan needs to harness. You will also develop a Mission Statement that will define the specific, tactical focus of your enterprise in the short-term future. Next, you will complete a comprehensive audit of the organization by using a unique 16-faceted Strategic Enterprise Assessment developed by Bill Bean. The audit will give you a foundation for evaluating the overall health of the enterprise providing you with a strategic vantage point that will be of great value to you in the goal-setting phase of the process. Finally, you will evaluate the environment in which you are now operating by completing an SF SWOT analysis. Several pieces of your work will be transferred to the working plan document in the “Plan Builder” section of this workbook.

Please note: The *Quick Start* path in the ***SP Toolkit*** process will only complete Steps 2,5 and 6 in this first phase. If you are following the *Start Up* path you will complete steps 1 through 4.

Phase Two Work

Having gained an overview of the direction and mission of the enterprise, its health and the opportunities and threats before it, you will then identify the strategic goals that should be given priority attention in the coming year. This phase appears as Step 7 on the process flow chart (see page 17). These are the strategic levers that, when utilized, will release the latent potential of the enterprise to achieve your ministry objectives. A prioritized list of goals will be developed using the 16 facets of the Strategic Enterprise Assessment as a paradigm for thinking strategically about your organization's future. This work will be integrated into the "Plan Builder."

Phase Three Work

The building blocks of an effective strategic plan are the action plans that you develop to implement the goals set in Phase Two. This phase appears as Step 8 on the process flow chart (see page 17). As good as the Phase Two goals may sound to you, if they are not translated into disciplined, conscious action-planning and implementation, the other demands of operations will hinder your achieving your vision. Your action plan work will be a central part of the "Plan Builder" and will position you for Phase Four.

Phase Four Work

While Phase Three focuses on *planning the work*, Phase Four helps you begin to *work the plan*. Using the "Plan Builder", which you will have worked with during your planning journey, you will learn how to successfully implement and manage the plan you have constructed. This phase appears as Step 10 on the process flow chart (see page 17). Plans should be like living and evolving entities rather than like straitjackets. Your plan should be able to continue to grow and adjust as you work with it. Phase Four is a flexible monthly management system that enables you to keep on track and to adjust to the unexpected needs and opportunities of tomorrow.

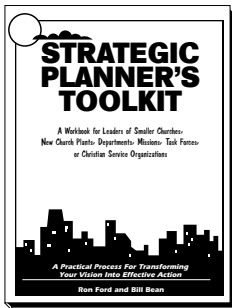
Addenda

Five other tools are included in an addendum and can be used to augment the planning process. Refer to the Strategic Planner's Toolkit Options Chart on page 18 for an illustration of how these features are integrated into the three planning path options.



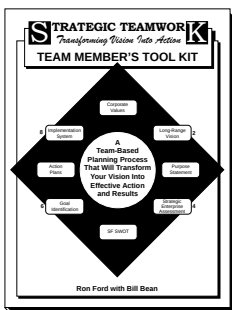
 We have developed resources to help you transform your vision into effective action and results. You don't have to be a rocket scientist or the C.E.O. of a big business to be good at strategy and making great decisions. Any Christian leader can apply the common sense principles of strategic thinking to their life and ministry and get more of the important things done, faster. No more spinning around in circles. Your life and your leadership can become proactive and as you learn to think and act more strategically.

We don't just tell you what you ought to do— we show you how to do it!



The Strategic Planner's Tool Kit

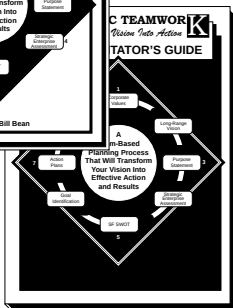
We have converted our powerful team-based planning process into a step-by-step workbook for individual leaders to use. Ideally suited for leaders of new or small ministries or organizations where planning is not being done as a team effort. This flexible planning system has everything you will need to build good plans for your ministry. Lots of extra tools and resources to help you be more efficient and effective are included in the appendices.



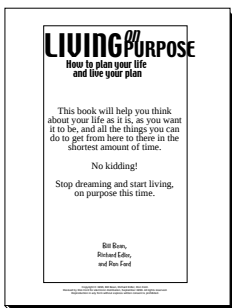
The Strategic Teamwork System

Our comprehensive planning system is built out of two resources.

The **Strategic Teamwork Team Members Tool Kit** is the core planning process we have used with many churches, para-church ministries, schools and other organizations. The **Tool Kit** contains all the worksheets and explanations the members of your planning team will need in your next strategy session.



The **Strategic Teamwork Team Facilitator's Guide** includes step-by-step directions for leading your team through this comprehensive planning process. You can custom design a process that fits your needs exactly.



Living On Purpose

Many people plan their work, but just let their lives “happen.” We’ve re-engineered our planning system so that you can be as proactive and focused in your life as you are in your ministry or your leadership. You will find the process simple, but not simplistic, and you will discover a new sense of purpose and direction for your life. This workbook is ideal for individuals or groups. It makes a very powerful retreat or workshop resource.



Our highest objective is to help Christian leaders and their teams increase their ability to think and act strategically about the Kingdom of God. Like Nehemiah, today's Christian leaders need to be able to move from that "which the Lord puts on their hearts" to the actual implementation of the vision. The Jerusalem wall wasn't built because Nehemiah was a great bible teacher, but because he was able to translate vision into action and results (and I'm sure his skills with the Word of God played a part). For many leaders this ability involves learning new concepts and skills which are usually left out of the average Christian leader's training and preparation.

We don't just tell you what you "ought" to do— we show you how to do it!

The Learning To Think Strategically About The Kingdom Workshop

This is not a workshop about the latest fads or trendy new techniques to make your church grow. **Learning To Think Strategically** is about the power of applied "common sense." You'll learn practical concepts and skills that enable you and your leadership teams to consistently transform vision into effective action and results. You'll take what you are learning in the sessions and immediately apply it to your church or ministry. At the end of this workshop you'll hold in your hands the beginnings of a comprehensive strategic plan that you can implement right now. **Learning To Think Strategically** is a true workshop—you will get a lot of work done here.

8 Things you will take away from this workshop:

- #1 **Learn** solid, biblical reasons for integrating strategic planning into the normal day-to-day of your church's ministry.
- #2 **Discover** how strategy relates to your primary function as a leader in your church.
- #3 **Assess** how well your church is doing in key areas of organizational development and ministry health.
- #4 **Identify** six reasons why Christian leaders don't plan, and how to overcome them.
- #5 **Clarify** the primary driving values of your church's ideal culture.
- #6 **Explore** seven principles of strategic planning in ministry.
- #7 **Experiment** with an effective planning process that will lead you through the core leadership processes of Discover, Decide and Do.
- #8 **Build** a comprehensive set of goals that address the highest priorities and the greatest opportunities for your church's future growth and development.

Who will benefit from this workshop?

- | | | | |
|---------------|-------------------|-----------------------|--------------------|
| ✓ Pastors | ✓ Associate Staff | ✓ Small group leaders | ✓ Department heads |
| ✓ Lay leaders | ✓ Board Members | ✓ Church planters | ✓ Outreach leaders |

We also have other leadership workshops and customized training for leaders and leadership consultants who wish to use our planning systems in their ministries.