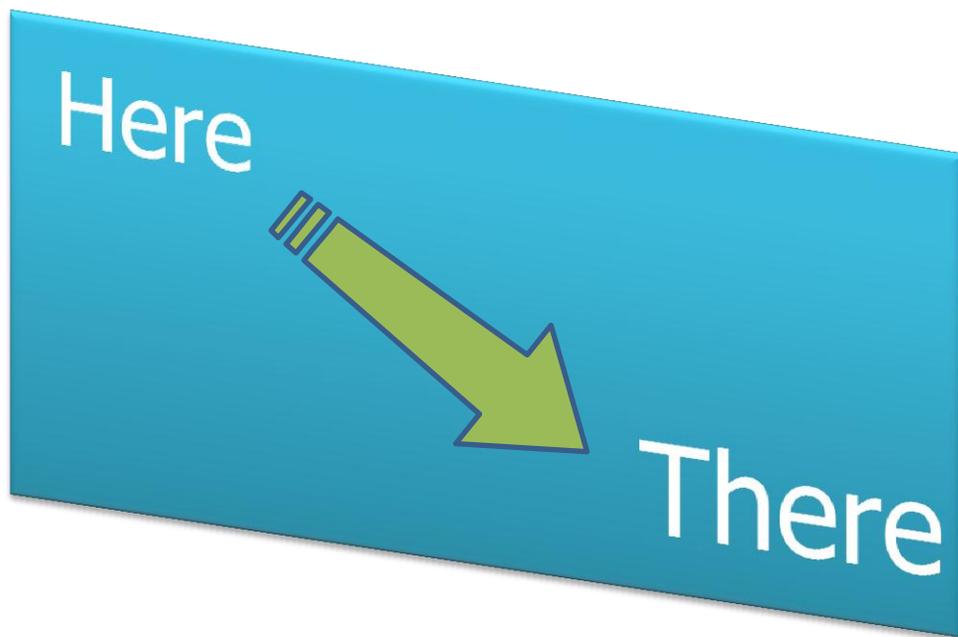


# Faith Based Success Planning

A Process for Supporting Change



I can do everything through him  
who gives me strength.  
~ Philippians 4:13



# **Faith Based Success Planning**

A Process for Supporting Change

or

How to Move From Here to There

By Jan G. Hansen

Jan G. Hansen B.A., M.A., B.Ed., O.C.T. is a teacher and elementary school administrator. This position requires him to orchestrate change and help others in the school to focus their efforts and adjust to new approaches. In addition to his work as a change agent in schools, Jan is an active member of his church, which gives him a deep understanding of a congregation's needs. Jan has taken on roles such as Sunday School teacher and superintendent, assistant minister, substitute preacher, member of church council and member of the committee which handles formal complaints from members. Jan has also had the opportunity to attend worship with hundreds of faith groups, most of them Christian, and engage in conversation with their members. This has given him a wide perspective of issues faced by people of faith. This resource is an attempt to bring together skills that Jan has learned in his professional life with needs that he has seen becoming more pressing in the lives of faith based communities. With God's grace we can adjust what we do so that faith groups continue to meet the needs of the people that they serve. Jan offers workshops to walk faith leaders through this change process. He can be contacted at [faith@gooseneckpress.ca](mailto:faith@gooseneckpress.ca).

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## Table of Contents

### Setting the Stage

1 Why change?

1 Believe in God, but tie your camel first

2 Who should use?

2 How to use

2 Railroads don't work

3 The dead Christmas tree

3 Ready, aim . . .

3 . . . Dream

### A Change Model

4-5 Creating a plan

### Handouts, Examples, and Templates

6 SWOT as a whole group

7 SWOT as individuals (worksheet)

8 Other models to identify the lay of the land

9 What does a congregation do?

10 SMART goals exercise

11-12 Faith based success plan example

13-14 Faith based success plan template

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## Why Change?

If you have this resource in your hands then you are already thinking about change. Congratulations! Too many groups sing the old song *If It Was Good Enough for Me Then It Is Good Enough for You*, also known as *We've Always Done It This Way*. The trouble with those tunes is that the world in which we are singing is changing. We do not need to lose the core of our faith, but we need to meet the needs of the people of the society in which we function.

Many churches are facing challenges,<sup>1</sup> but the quest for survival should not be the only reason to embark on this journey. Churches exist to do God's work, and we should be constantly asking how we can follow God's lead more fully.

Forget the former things; do not dwell in the past. See, I am doing a new thing! Now it springs up; do you not perceive it? I am making a way in the desert and streams in the wasteland.

~ Isaiah 43:18-19

## Believe in God But Tie Your Camel First

It was raining, and the creek was rising, but Roderick knew that God would look after him. When the police asked him to go to higher ground, Roderick said, "I will stay. God will look after me." When the water filled the ground floor, Roderick went upstairs, but he wasn't worried. A fire fighter came in a boat, but Roderick declined the offer. "God will look after me," he said. The water rose higher and Roderick climbed onto his roof. A helicopter lowered a ladder, but Roderick would not climb up, saying, "God will look after me." The water washed Roderick away and he died. When he got to heaven, Roderick asked St. Peter why God had abandoned him. St. Peter said, "God sent you a police officer, a boat and a helicopter. What more did you want?"

God does provide, but we need to listen for his whispers and see the opportunities around us. What we have done has led

us to where we are. If we want to be somewhere else, then we need to do something different.

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<sup>1</sup> Wayne Townsend points out that sixty percent of congregations are facing the possibility of bankruptcy in the next ten years. (*What Would It Take For Youth To Come To Church?*, Kitchener, Canada: Faith Mentor.net, 2011)

# Who Should Use This Resource?

This resource is easily adapted to a variety of groups. It was written with Christian congregations in mind, but handouts are written so that they can be used by non-church groups (with the exception of *What Does A Congregation Do?*), and are free from Biblical quotes so that they can be used by other faith groups as well. The purpose of the resource is to give faith based groups tools to strengthen their community.

## How to Use This Resource

This guide is designed to help you structure change. The process is simple: figure out where you are, decide where you want to be, develop a plan and evaluate its progress. This guide breaks it down into steps and provides resources and templates to use along the way.

This planning process is adapted from the success planning that is used in many Ontario schools. The Ontario school system is seen internationally as a model for targeted change. The heart of the process is the idea that when we measure progress we know better how successfully we are moving towards our goals, and whether what we are doing is helping us achieve them.

This resource can be used step by step, which takes time and commitment but will make your change process more effective, or you can dip in to pick and choose elements that will help you move your congregation forward. The SWOT process on its own, for example, was a key part of developing the strategy that won a provincial election in Ontario.

## Railroads Don't Work

If you try to railroad change through an organization without widespread support, it will be sabotaged from within. Sustained change can only happen when everyone is on board. Throughout the change process, it is important that the leadership of the congregation works to ensure that there is general buy-in of the goals. In order to be most effective, a plan needs support from all who are involved in its implementation.

Do two walk together  
unless they have  
agreed to do so?  
~ Amos 3:3

On the other hand, it is difficult to get things done when the group making decisions is large. It may be helpful to try to include the whole congregation in part A1, as outlined on the following pages, and to invite suggestions for part B1 as well. If the congregation is included in A1, then a summary should be distributed afterwards to give members an idea of what was said. A smaller group will need to define the plan, but at the end this group will need to describe to the congregation the thinking that went into developing it. In order to be successful, change needs to be an open process in which everyone feels that they have an opportunity for input.

# The Dead Christmas Tree

A decorated Christmas tree looks wonderful, all bright and sparkly, and it smells great too. It can be difficult to remember that the tree is no longer growing. Along the same lines, it can feel good to know that the congregation is busy, but when many things are being done, not too much is being done with any depth and the congregation may not be working towards achieving its goals. There is a danger in trying to focus on too many priorities, which is why it is suggested that you look for only two areas for growth.

## Ready, Aim . . .

Don't be afraid to fail. The only way to accomplish something is by taking risks. Not everything will turn out the way you hoped, but some will, and others will be better than you had imagined.

We often put a lot of work into planning, because we want to get it right. Sometimes the plans get revised, and then revised again and we find that we are putting in a lot of effort but not accomplishing anything. If we are not careful we can find ourselves with our troops itching to do something while we call out "Ready, aim, aim, aim, aim, ..."

Sometimes the best thing to do is to get started. We need to recognize that change is not something with a beginning, middle and end. It is an ongoing process. With that in mind, it makes sense to call out to your troops "Ready, fire, aim, fire, aim, ..." Take a shot, see how close you get to your goal, make adjustments, and try again.

## . . . Dream

There is a time and place to have your feet solidly placed on the ground, when you have a firm grasp on reality. There is also a time when we need dreamers. How *should* the world be? What would we *like* to see? What would be the *best* of all possible outcomes?

Without dreamers the world would be a dreary place, and we would have missed many great leaps forward. Have an eye to reality, but listen to the dreamers in your midst. If you are the dreamer, shout your fantasies out loud. You may never realize the dream, but imagine what it would be like if you could approach it.

Then Peter stood up with the Eleven, raised his voice and addressed the crowd ... "In the last days, God says, I will pour out my Spirit on all people. Your sons and daughters will prophesy, your young men will see visions, your old men will dream dreams.

~ Acts 2:14, 17

# Creating a Success Plan

## **Success Planning in a nut shell**

*Before beginning, agree on some ground rules. Then follow these steps:*

*A. Identify the current lay of the land. Where are we now?*

*B. Decide where you want to go and how you are going to know when (or if) you have achieved the goals.*

*C. Create a plan for how you are going to achieve the goals.*

*D. Evaluate progress.*

## **Before beginning, set some ground rules.**

Not everyone is used to working in a team environment, and some expectations of participants should be made clear from the beginning. It may be helpful to post the responsibilities of those involved on the wall. They will seem obvious and things that everyone can agree to, but as the planning progresses, people may need to be reminded of them. These expectations should be referred to at the beginning of each planning meeting, if there is more than one. Expectations should be tailored to the group, but may include:

- Speak to and about others with respect
- Focus on the needs of the whole group (not those of individuals, families or groups within the community)
- Seek first to understand (then to be understood)
- Every voice is important
- Keep an open mind and an open heart
- Speak to future hopes, not past grievances
- Speak only when recognized by the chair (or when recognized by the person running the meeting, or when holding the talking stick)

## **A. Where are we now?**

**1. Complete a SWOT process.** SWOT is a way of getting people thinking about the current state of the organization. This will give you a base line from which to measure growth, and may point to areas where growth is needed. Instructions can be found on page 6, “SWOT as a Whole Group.” “SWOT as Individuals,” found on page 7, can be distributed as an alternative which allows for more participation but reduces interaction between participants. If you choose the second option, then feedback should be given so that people have an idea of where others see the congregation. The next step of the process is to identify areas of growth. You could choose to include the boxes at the bottom of the page to ask for input into this step, or cover that part of the page when copying and leave that for a smaller planning committee.

## **B. Where do we want to go? (and how will we know when we are there?)**

**1. Define two areas of focus for the congregation for the next year.** Limit yourself to two areas of focus for growth so that new actions can be concentrated and the plan will have an impact. Ideas for the areas of focus could have come to the surface as part of the SWOT process. Another source of ideas can be the group’s mission statement, if it has one and it is current. Ideas can also be found on the page 9, entitled “What Does a Congregation Do?” As you go through this process you may choose to copy this sheet to help discussions within the planning committee.

In all your ways acknowledge him,  
and he will direct your paths.  
~ Proverbs 5:6

**2. Ensure that the planning group is familiar with writing SMART goals.** Writing goals can be difficult, and it is helpful to do some practising before engaging in the actual process. The “SMART Goals Exercise” on page 10 can help provide some clarity and practice.

**3. Set a SMART goal for each of the foci for growth defined above.** A key part of having a goal is being able to know when you have achieved it, which means that success is defined in a measurable way. Thought needs to be put into the way you will measure success as the goal is being written (e.g. 20% increase in attendance at worship, increase by 30% in the percent of people expressing satisfaction on a survey of members, most children can articulate the main point of the sermon). It is important that a measurement be taken at the beginning of the plan so that it is possible to measure if any progress has occurred. Keep in mind that you want to measure not the actions generated through the plan, but the results of those actions. For example, if your focus is to create a sense of community, do not measure how many pot luck dinners have been organised, but how well connected members of the congregation feel to each other. It is often more difficult to find a way to measure the results than measure the actions. Keep in mind that it does not need to be a number. It is OK to notice that we seem to support each other more, and have that be your measure of success.

### **C. How are we going to get there?**

**1. Create a menu of actions which will contribute towards achieving the goal.**

**2. Set individuals who will be responsible for coordinating the actions and for evaluating the goals.** If everyone is responsible, then no one is responsible and less will be accomplished.

**D. Evaluate the plan.** Plans can be changed along the way as it becomes apparent that something is, or is not, working. It is helpful to also schedule formal evaluation times. This gives a moment to look back at how success has been defined and to see how successful you are. This is an opportunity to make changes, and to celebrate progress. It is important to both fine tune the plan (to increase the chances of making your goal) and to give thanks for progress, no matter how small. From small beginnings big things can happen, and those implementing the plan need to see that they are making progress.

Then he took the seven loaves and the fish, *and when he had given thanks*, he broke them and gave them to the disciples, and they in turn to the people.  
~ Mathew 15:36

### **The final words:**

The plan should have a one year time-frame. Goals should be tweaked each year, but not thrown out and something totally new put in their place. Keeping similar goals allows the opportunity to go deeper, rather than constantly switching tracks.

Be fearless. When you are thinking of what to change, imagine your ideal world and see if you can take steps that will bring you closer. Change is an exciting process. Enjoy the ride.

## SWOT as a Whole Group

Talking about the purpose of an organization and hopes for the future can be stressful and divisive. It is important to find ways of pulling people back together, such as through song. Eating together also promotes a sense of community. When engaging in this activity, consider at least providing snacks.

Divide into tables with five to ten people at each table. On each table have four pieces of chart paper, each with one of the following headings: Strengths, Weaknesses, Opportunities, and Threats.

- Open in prayer and/or song.
- Invite the groups to brainstorm things happening in, or that effect, the congregation for each of these four areas, having one group member writing them down with a magic marker. Remember that in brainstorming, all suggestions are accepted.
- When the stream of suggestions slows, invite the groups to go back and identify two or three main points in each category.
- Ask each group to present the main points. Invite comments on areas of agreement. Typically, a few points will repeatedly come forward, emerging as a natural consensus
- Close in prayer and/or song.

### An alternative

If there is division in the congregation which causes concern that the ground rules may not be abided by, then another way of gathering the information and sharing it is to use post-it notes. Provide post-it notes that are large enough to write a couple of sentences on, and at least ten per person. Have the wall divided into four areas, each with one of the following headings: Strengths, Weaknesses, Opportunities, and Threats

- Open in prayer and/or song.
- Invite people to think about things happening in or that effect the congregation in these four areas.
- Invite them to share with an elbow partner if they would like.
- Have them write their comments on the post-it notes.
- Invite them to place their post-it notes on the wall under the appropriate heading.
- Before asking them to get up, inform them that they are not allowed to move anyone else's comments and remind them of the expectations for participants.
- As the post-it notes are being placed, there may need to be referees in place who will remove incendiary notes. If such a monitor is to be put in place, let people know in advance. Let them also know that the notes will be taken into consideration by the committee developing the success plan but are not appropriate for a larger setting.
- Once the post-its are in place, invite people to survey others' comments, looking for areas of agreement. Invite comments that are consistent with the behaviour expectations.
- Close in prayer and/or song.

Speak to one another with psalms, hymns and spiritual songs. Sing and make music in your heart to the Lord.  
~ Ephesians 5:19

## SWOT as Individuals

In order to help identify how individuals see the state of our faith community, we are inviting as many as possible take a moment to provide input. You do not need to include your name, and each person should use a separate form, even if they say the same thing. Feel free to add more information on the back of the page. Forms should be returned to \_\_\_\_\_ by \_\_\_\_\_.

|                      |                   |
|----------------------|-------------------|
| <b>Strengths</b>     | <b>Weaknesses</b> |
| <b>Opportunities</b> | <b>Threats</b>    |

*Ask yourself:*

*What could we do better? What do I want this congregation to be known for?*

**My suggestions for two areas of congregational focus for the next year are:**

|  |
|--|
|  |
|  |

# What Does a Congregation Do?

## An Aid to Identifying a Congregation's Areas of Focus

This is not an exclusive list, but is meant to help generate ideas about potential areas for growth for your congregation to focus on.

### **Worship**

Child care/entertainment during worship  
Children's sermon  
Communion  
Greeters/welcoming people to worship  
Lay involvement in worship  
Marking life events (baptism, confirmation, weddings, funerals)  
Music  
Preaching  
Prayer  
Prayer teams  
Technology (e.g. data projector, sound system, recording/distributing video)

### **Evangelism**

Outreach practices  
Outreach events  
Retention of members

### **Service**

In the congregation  
Outside the congregation  
Locally  
Nationally  
Internationally  
For children  
For youth  
For the elderly  
For the sick  
For shut-ins  
For families  
For refugees  
For the physically challenged  
For the mentally challenged  
For the mentally ill  
For the homeless/those facing poverty  
For linguistic or cultural groups  
For the natural world

### **Education and Training**

Bible Study  
Identifying and encouraging future pastors  
Preaching  
Presenters from outside the congregation  
Sunday School (for children and/or adults)  
Training/mentoring seminarians, pastors, and other leaders

### **Building Community**

Coffee hour after worship  
Complaints resolution process which is clear  
Events (e.g. music nights, movie nights, suppers, bazars, yard sales)  
Group service opportunities (e.g. helping at a food bank, roadside litter removal)  
Men's group  
Social groups/small groups/home groups  
Visitation of members  
Visitation of non-members  
Women's group  
Youth group

### **Stewardship**

Building repair  
Custodial services  
Environmental impact of building  
Outside group use of building (e.g. Scouts, Alanon, daycare, as a polling station)  
Planned giving (through wills)

### **Communication (a means towards the other ends)**

Bulletins  
Displays in the church  
Web site/Email/twitter/LinkedIn/Facebook  
Local TV/Radio/Newspaper  
Newsletters  
Sign outside church

## Other models to Identify the Lay of the Land

There are other models of assessing the current state of an organization, each with different strengths. Although the SWOT model makes sense in many cases, you may find another model is more suitable to the needs of your congregation. Below are two other approaches.

### Stop Start Continue

The process for using this model is the same as for SWOT, but there are only three categories. Ask participants to identify what they would like to start doing, what they would like to stop doing and what they would like to continue. The key difference between this process and SWOT is that it is focussed on the activities that a congregation does, rather than the situation in which the congregation finds itself.

A limitation with this process is that it does not identify the thought process behind the responses. You don't find out why people are attached to things, or why they would like to try something new. It would be helpful to ask people for their reasons. This will help the leadership team evaluate the input as they develop next steps. "Tradition," for example, is a weaker reason than "It will help my kids feel welcome."

### Appreciative Inquiry

This process starts with the question "What is working well?" Appreciative Inquiry has four steps. For the purposes of this the Success Planning approach, step 1 corresponds roughly with *A:Identify the lay of the land*, step 2 corresponds with *B:Decide where you want to go*, step 3 corresponds with *C:Create a plan*, and step 4 is what both processes are designed to accomplish. The steps are:

1. Discover: Identifying processes that work well (Appreciating and valuing the best of what is)
2. Dream: Envisioning processes that would work well in the future (Imagining what might be)
3. Design: Planning and prioritizing processes that work well (Engaging in dialogue about what should be)
4. Deliver: Implementation of the proposed design (Walking the path to what will be)

The basic idea is to build around what works, rather than trying to fix what doesn't. Proponents of this process describe it as the opposite of problem-solving. There is a positive focus on how to increase exceptional performance instead of improving poor skills and practices.

If you are going to use this approach, beware of romanticizing the past. Change can be a hard process, and some things may need to be lost. People in your community may go through a process of mourning . While that is a natural part of change, there is no sense in intensifying it. Work towards a positive focus on the future, rather than dwelling on high points of the past.

## SMART Goals Exercise

### A SMART Goal is:

Specific  
Measurable  
Achievable  
Results oriented  
Time bounded

SMART is a way of writing a goal which makes it clear what one is attempting to achieve, and how success will be measured.

“I will lose thirty pounds in the next three months” may be a SMART goal. It is specific, the results can be measured and there is a deadline. It may be achievable. One hundred pounds would not be achievable, five pounds may be achievable but would not stimulate change.

#### **I will lose weight this year.**

Specific  Measurable  Achievable  Results oriented  Time bounded

Comment: *Not specific because it does not specify how much*

#### **I will be happier.**

Specific  Measurable  Achievable  Results oriented  Time bounded

Comment: *Happiness is difficult to measure, there is no time limit*

#### **I will stop eating hamburgers this year.**

Specific  Measurable  Achievable  Results oriented  Time bounded

Comment: *Not results oriented. It measures one's actions and not the results of those actions. If you stop eating hamburgers but start eating donuts then you will not be effectively reaching your real goal of eating healthier.*

Evaluate the following goals:

#### **More people will come to worship events.**

Specific  Measurable  Achievable  Results oriented  Time bounded

Comment:

#### **Those unable to come to events will be contacted or visited each week.**

Specific  Measurable  Achievable  Results oriented  Time bounded

Comment:

#### **By November, monthly family evening events will meet the needs of our community to the extent that they draw twice as many people as the event a year earlier.**

Specific  Measurable  Achievable  Results oriented  Time bounded

Comment:

## Faith Based Success Plan Template Example

Congregation's Name: Faith Lutheran Church

Success Plan Committee Members: Karen Pryce, Allan Parsons, Sara Whittenable, Lars Knudsen, Rev. Clyde Holm

| <p><b>Mission statement:</b><br/>         Faith Lutheran strives to be a caring and friendly church, for all people. Through our worshipping, learning and serving others we believe that God will show his love to the world.</p>                                 |   |   |
|--|---|---|
| <p><b>Area of focus for growth #1:</b><br/>         Develop a stronger youth program.</p>  | <p><b>Area of focus for growth #2:</b><br/>         Promote learning at all ages.</p> |   |
| <p><b>SMART goal for first area of focus:</b><br/>         The youth in the congregation will feel connected to the larger congregation to the extent that their friends outside the congregation will join them in participating in activities in the church.</p> |   |   |
| Actions to achieve the first goal  | Timeline  | Who is responsible                                  |
| a) A youth group will be created with activities at least every other month.   | Sept. 2012-Aug. 2013  | Bill Ralph  |
| b) Once a month, contemporary music will be used during worship instead of the organ.  | Sept. 2012-Aug. 2013  | Allan Parsons                                       |
| c) Youth will be encouraged to be part of the contemporary music band.   | Oct. 2012-Aug 2013  | Allan Parsons                                       |
| d) A youth retreat will be organized.  | March 2013-May 2013   | Karen Pryce   |
| e) Funds will be provided to support youth activities  | December/February   | Finance committee and congregational annual meeting |
| f) Opportunities to connect with other churches in the neighbourhood will be explored.   | October   | Sara Whittenable                                    |
| g)   |   |   |

| <b>SMART goal for second area of focus</b>   |  |                           |
|--|--|---------------------------|
| Develop a more comprehensive learning program so that 50% more people participate in learning opportunities outside of worship than is currently the case. |  |                           |
| <b>Actions to achieve the second goal</b>  | <b>Timeline</b>                              | <b>Who is responsible</b> |
| a) Survey parents of children of Sunday School age to see what timing and what sort of program would best fit their needs.                                 | September 2012                               | Sara Whittenable          |
| b) Adjust Sunday School program to meet the needs discovered in the survey.  | Jan. 2012 and Sept. 2013                     | Phil Fitzgerald           |
| c) Create a library of supports and resources for home groups so that when they meet they will have something to talk about.                               | September and October 2012                   | Karen DuToit, Rev. Holm   |
| d) Recruit and train leaders for home groups.  | September and October 2012                   | Dorothy Pryce, Rev. Holm  |
| e) Recruit/assign members to home groups.  | November 2012                                | Sara Whittenable          |
| f) Create a Sunday morning program either for adults during Sunday School or for families (depending on survey results).                                   | November/December 2012                       | Shannon Hart              |
| g) Create four fun events for children/families.   | Sept. 2012, Dec. 2012, Easter 2013, May 2013 | Carolyn Greenhalgh        |

This plan is for a year beginning: September 1, 2012

Date for mid-year evaluation: February 14, 2013

Date for end-of-year evaluation: July 25, 2013

## Faith Based Success Plan Template

Congregation's Name:

Success Plan Committee Members:

|  |                              |                    |
|--|------------------------------|--------------------|
| Mission statement:                     |                              |                    |
| Area of focus for growth #1:           | Area of focus for growth #2: |                    |
| SMART goal for first area of focus:    |                              |                    |
| Actions to achieve the first goal      | Timeline                     | Who is responsible |
| a)<br>b)<br>c)<br>d)<br>e)<br>f)<br>g) |                              |                    |

|                                     |          |                    |
|-------------------------------------|----------|--------------------|
| SMART goal for second area of focus |          |                    |
| Actions to achieve the second goal  | Timeline | Who is responsible |
| a)                                  |          |                    |
| b)                                  |          |                    |
| c)                                  |          |                    |
| d)                                  |          |                    |
| e)                                  |          |                    |
| f)                                  |          |                    |
| g)                                  |          |                    |

This plan is for a year beginning:

Date for mid-year evaluation:

**Date for end-of-year evaluation:**





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