Growing Congregational Vitality: Missional Planning Process Workbook

by Dr. Joyce Thompsen

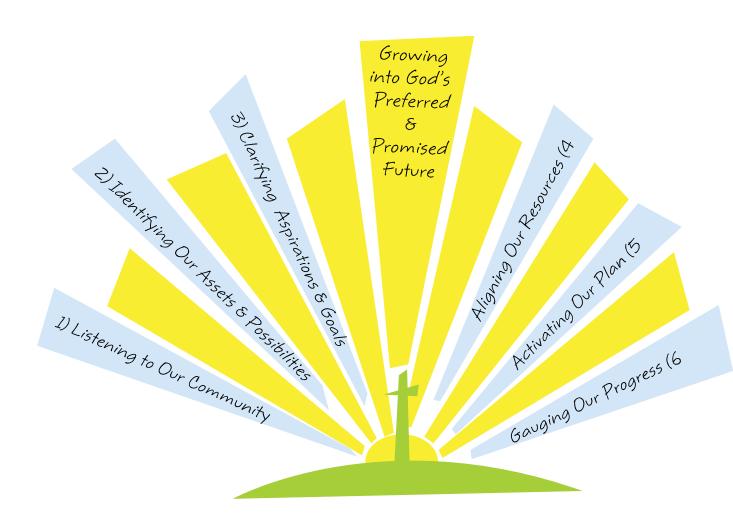




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September 2013

Greetings,

I give thanks to God for you, your community of faith and our shared life together in Christ Jesus.

Like disciples and apostles in the past you are taking time to pray, think, imagine, share hunches, create strategies and lay out plans to steward the Gospel into the next chapter of your community of faith's life. It is holy and urgent work as we seek to discern God's will and understand God's preferred and promised future for each of us and the communities of faith where we are nurtured, fed and sent to live out our many callings.

Your synod's Mission Table focuses on this phrase.

Every congregation is a mission station Every pastor is a mission director Every baptized person is a missionary For the sake of God's world!!

I am thankful for the hard work of Dr. Joyce Thompsen, Vice President of the Southwest California Synod, for her synod's work which has helped us do missional planning, for Pr. Larry Strenge and his work as the Director for Evangelical Mission, and for our "Mission Table" chaired by Pr. Dee Pederson as it continues to support our "Growing into God's Planned and Preferred Future" through its work.

May God bless us with a great conversation that leads to faithful and fruitful action as we pray, "Oh Holy Spirit plant great ideas, give us courage to risk and experiment, guide us to see what we might learn from our mistakes and successes, deep love for our Lord, one another and all God's people."

O God, you have called your servants to ventures of which we cannot see the ending, by paths as yet untrodden, through perils unknown. Give us faith to go out with good courage, not knowing where we go, but only that your hand is leading us and your love supporting us; through Jesus Christ our Lord. Amen.

In Christ.

Pr. Jon Anderson Serving as Bishop of the Southwestern Minnesota Synod

The Call to Do Missional Planning in Congregations

by Dr. Joyce Thompsen* and Rev. Diane "Dee" Pederson**

The 2011 Churchwide Assembly of the Evangelical Lutheran Church in America gratefully received and approved the report of the "Living into the Future Together: Renewing the Ecology of the ELCA" (LIFT) Task Force. The purpose of the study was "...to recognize the evolving societal and economic changes of the twenty years since the formation of this church and to evaluate the organization, governance and interrelationships among this church's expressions in light of those changes."

Recognizing the significant changes and opportunities placed before the ELCA by the mission of our triune God, the LIFT task force was led by two overarching questions:

- 1. What is God calling this church to be and do in the future?
- 2. What changes are in order to help us respond most faithfully?

The LIFT task force found that, at this time in the history of both the world and this church, a renewed commitment is needed to the ministry of local communities of faith. That commitment focuses on strengthening the missional vitality of local congregations in their ministry context. A congregation's vitality can be understood by looking at the relationships of its members with the triune God, with each other, and with the community.

Vital congregations deepen the discipleship of their members, who speak openly about their faith with their friends and their neighbors. With the Holy Spirit's gifts of hope and courage, the people in these congregations are set free in Christ to serve their neighbors and the world with joy and compassion.

The LIFT report called for a priority of the Evangelical Lutheran Church in America to work together to nurture congregations that are:

- Evangelical proclaiming God's reconciling forgiveness, mercy and love.
- Missional engaging in witness and service for the sake of God's mission in the world.

At the 2011 Churchwide Assembly, the LIFT recommendations for action were affirmed. These actions include:

- Making support for the work of congregations one of the highest priorities of this church.
- Requesting congregations, in collaboration with synods, to begin, develop, review or redefine their unique missional plans so that each congregation strengthens its capabilities and resources for witness and mission.
- Supporting and strengthening synods so that they become catalysts for missional planning.

Congregations and synods are encouraged to act in partnership and collaboration to develop missional plans that will strengthen the congregations in fulfilling God's mission in the world. Congregations are encouraged to develop plans to grow as many of the following characteristics of missionally vital congregations as are realistic:

- Fostering mature faith and discipleship in members.
- Understanding God's grace as the foundation of restored relationships with God, one another and the world.
- Worshipping God and receiving God's presence and promises in Word and sacrament.
- Strengthening evangelical outreach.
- Supporting lay, lay rostered and clergy leaders.
- Serving others in the way the congregation uses its resources.
- Learning about the congregation's surrounding community, including its racial and ethnic diversity and how this context might inform ministries.
- Building and maintaining relationships and partnerships with other ELCA congregations, the synod and the wider church for the sake of God's mission in the world.
- Building and maintaining relationships and partnerships with other religious and non-religious groups in the congregation's area and globally for the sake of God's mission in the world.
- Supporting people in their daily vocations of work, family life and relationships.
- Discerning what should be celebrated, engaged, tweaked or relinquished for the sake of God's mission.
- Sustaining the congregation's missional plan and determining how it will be carried out.

This "Growing Congregational Vitality: Missional Planning Process Workbook" is intended to provide assistance to congregations of our ELCA's Southwestern Minnesota Synod in this pursuit.

Dr. Joyce Thompsen, author of "Growing Congregational Vitality: A Missional Planning Process Workbook," serves our Lord in a variety of ways. (A complete resume is available upon request from the SW Mn Synod office. It is too large to publish!) Among those callings, she serves as the Vice President of the ELCA's Southwest California synod and is a member of the ELCA's LIFT II (Living Into The Future Together) Advisory Committee.

**Rev. Diane "Dee" Pederson served as the chair of the ELCA's LIFT task force from 2009-2011 and is a member of the LIFT II committee. In the Southwestern Minnesota Synod she serves as chair of the synod's "Mission Table" and as "Lead Pastor" at Bethlehem Lutheran/St Cloud. She offered input for the writing of "The Call to Do Missional Planning in Congregations."

Overview of the Missional Planning Process: The "why" and "how"

The purpose of this Missional Planning Process Workbook is to directly respond to the LIFT resolutions and call to action at the 2011 Churchwide Assembly. Briefly, those actions are:

- Congregations are to begin, develop, review, or redefine unique mission plans.
- As a synod, provide assistance to congregations for a mission planning process and, in doing so, uplift congregation well-being.
- Congregations and synods are to collaborate in equipping leaders to plan and serve others.

This workbook intentionally builds on our previous work in this synod especially the Synod series of conference workshops called, "*Inviting and Welcoming: God's Preferred and Promised Future*." In these workshops over 700 persons from 10 conferences were introduced to missional planning tools including the Three Great Listenings, Dwelling in the Word, Discovering Hope, SOAR, as well as other ideas.

This workbook contains a simplified model and set of guidelines for use or adaptation by congregations. Practical tools and techniques are included to help mobilize all of our congregations.

A simple graphic of this model appears on the front cover as well as on the following page. The process originates and is sustained in first understanding what God is calling each congregation to <u>be</u> and <u>do</u> as it is "Growing into God's Preferred & Promised Future" in its unique context. The Holy Spirit is central to this unified process! Then, the process stages (1-6 below) flow continuously and actively engage that discernment.

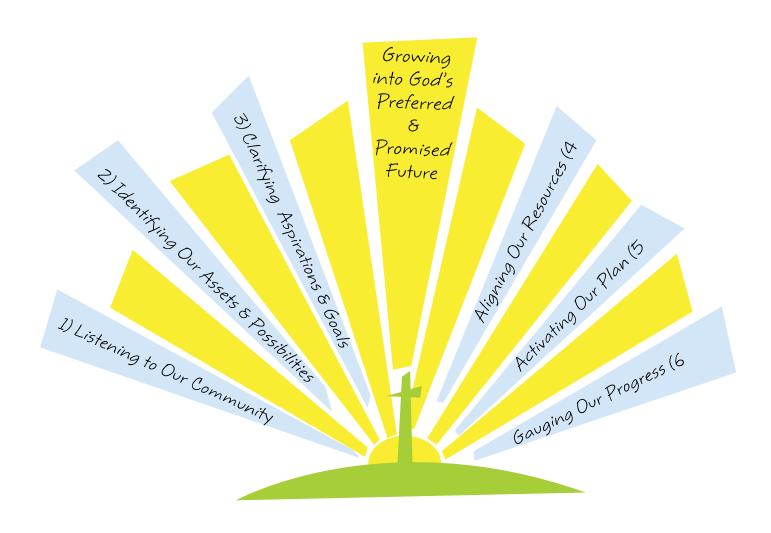
- 1) Listening to our community.
- 2) Identifying our assets and possibilities.
- 3) Clarifying aspirations and goals.
- 4) Aligning our resources.
- 5) Activating our plan.
- 6) Gauging our progress.

The following pages provide more detailed suggestions, practical tools, and recommendations for each "growth stage." Sample documents to assist in each stage appear in the exhibits beginning on page 26.

Southwestern Minnesota Synod, ELCA

Growing Congregational Vitality: Missional Planning Process*

*This process assumes the Holy Spirit is always present and guiding for this is "God's Mission" in which we do "missional planning!" The "center"—radiating out like the sun's light (Ps 19—"and nothing is hid from its heat")--informs all of the other six "stages of growth." As such, each stage of growth is part of one "Missional Planning Process," one lived out within "God's Mission." Each stage of growth--supported by the Holy Spirit working through the means of grace, Scripture, worship, prayer, people, generous giving, and the like-contributes to growing health and vitality for a congregation and the world around it.



Growing Congregational Vitality: Missional Planning Process-Growing into <u>God's</u> Preferred & Promised Future

The entire Missional Planning Process is *grounded* in this essential starting point: seeking, understanding, reflecting, discerning, and engaging fully with what <u>God</u> is calling each congregation to **be** and **do** in its unique context as it **grows** into God's Preferred and Promised Future.

This initial process step is similar to a germination of good seed. From the fertile soil of God's Word sprouts the discovery of each congregation's calling to serve, its hopes, the stimulus for its development, its stretching, its growth in influencing the culture within its community, its ability to thrive, its vitality, its own maturing, and reaching out in the light of Christ.

Similar to the two overarching questions that were addressed by the Living Into the Future Together (LIFT) Task Force, congregations are asked to consider these three questions* as they enter this Growing Congregational Vitality: Missional Planning process.

- Why in God's name do we exist?
- Where in Jesus' name are we going?
- How by the power of the Holy Spirit are we going to get there?

Along with these three guiding questions Bishop Jon Anderson has adapted a question he learned from Mark Peterson, former LSS/Mn CEO:

• What is the greatest possibility we can imagine God is doing – or could do --in our community?

You, as leaders chosen by the Holy Spirit to lead in your setting, are invited to read and dwell in Scripture together, engage in prayer, and ask these key questions from above. Additionally, you are invited to read and reflect on any or all of the following Scriptures. Practice deep listening to each other by sharing in either small groups or in pairs. Examples include:

- Luke 10:1-12
- Philippians 1:27 and 2:5-11
- Ephesians 3:18-20 and 4:15-16
- 1 Corinthians 12:4-7
- Acts 1:8
- Colossians 2:6-7

Additional questions you may consider asking about these passages include:

- What were the people called to be and do?
- How does the experience of these early Christians compare with our situation?
- What is God up to in our own congregation and community?

In prayer, seek the power of the Holy Spirit to guide your dwelling, discernment, and full engagement about what God is calling your congregation to *be* and *do* as it grows into God's Preferred and Promised Future.

^{*}These three questions are attributed to Bishop Mark Narum, Western ND Synod, ELCA

Growth Stage 1: Listening to Our Community

The purpose of Growth Stage 1: In this stage of the Missional Planning Process, as leaders and members of your congregation, you are invited to look <u>beyond</u> your congregation – into your community and neighborhoods.

At this stage of growth you are seeking to identity opportunities for mission that God reveals in your community. You are also gathering data and beginning to discover:

• What is the greatest possibility you can imagine God is doing or could do in your community?

Tools utilized in Growth Stage 1: There are a number of tools that you can use to listen to people and analyze the environment of your communities and neighborhoods. In this synod, like a master gardener, we have recently been using these four tools:

Tool 1: Three Great Listenings

- Listening to God
- Listening to one another
- Listening to the neighborhood and context

Tool 2: Dwelling in the Word*

- o A way to listen to God and to one another
- Asking what caught each other's attention
 *"Dwelling in the Word" was developed by Pat Taylor Ellison and Pat Keiffert see: www.churchinovations.org

Tool 3: SOAR

- o Strengths of the Spirit, Opportunities, Aspirations, Results
- Applying the "O" or "Opportunities" questions:
 - What is God longing for us to see here?
 - What are some common longings as God's people in our community?
 - Who am I? Where do I belong? What gives life meaning and purpose? What is giving life hope?
 - How do these longings as God's people lead us to work on God's mission?
- Other questions include:
 - What needs of our community are currently not being addressed?
 - What people in our community are currently being underserved or overlooked?

Tool 4: "Discovering Hope: Building Vitality in Rural Congregations*" with its practices to achieve vitality. These seven practices are:

- o Prayer
- Worship
- o Discipleship
- Evangelism
- Congregational Care

- Leadership
- Context: Discovering the gift of place*
 - * Augsburg Fortress (2001) authors L. Shannon Jung and David Poling-Goldenne

Here are some other tools you might find useful:

Tool 5: **Identifying current ways in which your congregation engages** with its surrounding community in gospel-centered ministry. Here are some questions.

- How does our congregation use its facilities in outreach?
- o How might our congregation use other assets in evangelism and mission?
- o Who among our members are engaged in the current ministry of our congregation?
- What financial and other resources of our congregation are allocated for this ministry?
- How do we track members who engage in other gospel-centered ministries outside of our congregation?

Tool 6: Mapping congregational assets to identify gifts that are already in place in your congregation and how those may be applied within your community, neighborhoods, and beyond. Typical steps include:

- o Recognizing your assets (physical, individual associations, institutions, and economic)
- o Creating links between those assets to form potential action ideas
- o Following your hearts to vote on priorities and create a work plan

Tool 7: Securing and mining demographic information for your community and neighboring area.

- Some congregations may have recent demographic data from **Percept** to use for this purpose.
- o Another source is the ELCA Office of Research and Development, which is accessible online at www.elca.org/research.
 - Through this website location, you may secure a ZIP Code Report for the zip code of your church address – or for nearby zip codes from which you currently draw members or choose to engage.
 - Prepare to fill in the designated zip code number, Southwestern Minnesota Synod 3F, and your congregation's five-digit identification number.
 - The data includes a synopsis of:
 - Population changes
 - Population information by race and age
 - Household descriptions
 - Per capita and household income
 - Educational attainment
 - Employment status and occupations
 - Travel time to work
 - Marital status
 - Home ownership and rentals

- For further comparison, you may choose to use your preferred Internet source to access
 Wikipedia or other zip-code-oriented data about your community. The demographics
 section typically provides comparative data over at least two decades and includes the most
 recent census data such as:
 - Population density, racial makeup
 - Household descriptions
 - Age groupings
 - Home ownership and rentals
 - Median income
 - Information about why changes occurred in the population

Tool 8: Conducting interviews with leaders in your community who have important insights and information about the people and unique needs within your neighborhoods. You may choose to collaborate with other churches (Lutheran and other members of your local ecumenical group) in completing this activity. Then, the findings may be addressed in some form of shared mission and ministry. Some local leader contacts may include:

- Township and county supervisors
- County agriculture agents
- City council members
- o Chiefs of police, fire, and emergency services
- Chamber of Commerce
- Mayor
- Congressional representatives
- Legal and judicial professionals
- School superintendents and principals
- School board members
- Teachers and parent groups
- Civic or social service groups
- Local business owners
- Coaches and sponsors of sports leagues
- **Key questions to address in this environmental analysis**, whether through any form of data mining or interview process, include at least the following:
 - o What are recent changes in our community?
 - o What are the strengths of our community?
 - o What are the population trends?
 - o What concerns do people have?
 - o What are the major challenges in our community?
 - What are our top three priorities? Why?
 - o What organizations are already successfully addressing these needs?
 - o How have churches been active and helpful in addressing these community needs?
 - Where can our congregation help?
 - o What partnerships may be developed to address these needs?
 - o How are you willing to participate?

Moving Beyond Growth Stage 1

There will come a point when you have heard enough from the community. The Holy Spirit will reveal this in prayer and conversation. At this point, the attention of leaders and members of your congregation may look internally. But remember, now that you have learned how to do this listening, keep doing it!!!

Notes/Reflections/Ideas on Growth Stage 1:

Growth Stage 2: Identifying Our Assets & Possibilities

Purpose: In this stage of the Missional Planning Process the focus turns to your internal culture: how you have been doing things, your heritage, your operational capability, and all forms of assets. You are invited to gather more data and evaluate your congregation's assets using one or more of the "tools" used in Growth Stage 1.

You'll be inviting your leaders and members to engage in **deep listening** (Tools 1 & 2) with one another. You'll be encouraging people to speak openly about:

- What's working here? How do we know? Why are things working well?
- How do we typically approach opportunities?
- How do we reframe problems to become opportunities?
- How do we conduct our mission and ministry operationally to optimize results?
- What is our heritage since the beginning of our congregation?
- How does that heritage manifest itself in our prayer, worship, education, evangelism, discipleship, congregational care, leadership, and place within the community?
- What assets are lying idle? Contributing less than what is possible?
- What is in our midst that we have not recognized as assets?

Using the **SOAR** tool (Tool 3), you can lift up recently asked questions or start fresh in addressing:

- What is God longing for us to see here?
- What are some of our common longings as God's people in our congregation?
- Who am I? Who are we? Where do we belong?
- What gives our life together meaning and purpose?
- What is giving us hope?
- How do these longings and deep questions lead us to work together on God's mission?

You could choose to **map congregational assets** (Tool 6) to identify gifts that are already in place. As noted earlier, typical steps include:

- Recognizing your assets (physical, individual, associations, institutions, and economic)
- Creating links between those assets to form potential action ideas
- Following your hearts to vote on priorities and create a work plan

Another major resource for identifying and analyzing your congregation's assets and possibilities is the set of findings from a **Ministry Site Workshop**. (See Appendix for a more complete description.)

There are other approaches for "Identifying our Assets and Possibilities." One is to ask members directly about their capabilities and skills. Members can be mobilized and engaged very creatively, sometimes in unique combinations, to pursue the mission and ministry of your congregation.

Here are some sample questions that you may want to use in interviewing members:

• What capabilities, experience, or professional skills do you have that can be particularly helpful in at least the following areas?

- o Management and administration of an organization
- o Financial modeling and investment
- Property management
- Construction and repair
- o Rural community development
- Law and justice
- Hospitality
- o Marketing, advertising, and public relations
- o Teaching, group facilitation, and curriculum development
- o Organizational development
- o Care-giving and social service
- Community organizing
- Music and the arts
- o Technology and media service applications
- Communications
- o Strategic planning and goal setting
- Service on community, county, regional, national, or internationally focused groups or boards
- How does our congregation identify and track such capabilities and willingness on a regular basis?
- How do we translate these skills, experiences, and capabilities into effective application toward the mission and ministry of our congregation?
- When people have volunteered such services, how has our congregation accepted those offers and shown appropriate gratitude and recognition?

Making sense of what you have heard

As we move from "Listening to the Community" and "Listening to the Congregation" into Growth Stage 3, "Clarifying Aspirations and Goals," we need to step back and begin to make sense of what we've heard. Here are three excellent questions to consider:

- What has God already placed in our midst that God can build upon through us?
- What "Strengths" ("S" in SOAR) given by the Spirit do we have for application in our unique context?
- What is the greatest possibility you can imagine God is doing or could do in your community?

The findings from your initial work in understanding what God is calling your congregation to be and do as you "Grow into God's Preferred and Promised Future" will greatly inform the work of this next growth stage, Clarifying Aspirations & Goals.

Notes/Reflections/Ideas on Growth Stage 2:

Growth Stage 3: Clarifying Aspirations & Goals

With this growth stage, all of the input, involvement, and findings of "Listening to Our Community" and "Identifying our Assets & Possibilities" work will begin to converge to form a shared vision.

This is time to pause and review again. This is one process and each stage contributes to that process. We recall from the overview: "The process originates and is sustained in first understanding what God is calling each congregation to be and do as it is "Growing into God's Preferred & Promised Future" in its unique context." It is also helpful to recall the words of Psalm 127: 1-2, suggesting that a congregation that gets excited about its plans, but perhaps without enough attention to God's direction, will labor in vain.

"Unless the Lord builds the houses, those who build it labor in vain. Unless the Lord guards the city, the guard keeps watch in vain." (Psalm 127:1-2)

Further, reflecting upon the words of Proverbs 16:9:

"The human mind plans the way, but the Lord directs the steps."

This is the time to clearly and boldly ask once more a number of central questions. Then, as leaders and members, you can again listen deeply and ponder together your authentic answers for how to grow into God's Preferred and Promised Future. Here are some simple and direct questions that intentionally repeat what may have been asked earlier.

- Who are we? What is our identity?
- How has our heritage influenced that identity?
- What is God up to here?
- What has God already placed in our midst that God can build upon through us?
- What is God's purpose for our ministry?
- How are we being called to grow into God's Preferred and Promised Future?
- What is God calling our congregation to be and do in the future?
- What is the greatest possibility you can imagine God is doing or could do in our congregation and our community?
- What is God revealing to us that God longs for us to see clearly?
- What are we passionate about doing so we may grow into God's Preferred and Promised Future?
- What do we need to do to be even more effective for God's work in this place?
- What changes are in order to help us respond most faithfully?
- What degree of commitment do we share together about God's mission and ministry?

This is also an important time to ask challenging, difficult questions about our focus and intentions as a congregation, as a community maturing and reaching out in Christ.

Following are some starter questions for congregations at any stage of missional planning – those who are doing missional planning for the first time, those who are developing plans that have been in place for awhile, those who are reviewing or refining plans to engage in even more critical thinking, or those congregations who have determined to start over. First, ask, "Have we done this?" Then: "How and what has been the impact?"

- Has our congregation changed its mission and ministry to deal with the new realities of our rural (or small town, larger community, etc) environment?
- Has our congregation been willing to set aside its heritage to engage in collaborative parish ministry with one or more other congregations?
- Has our congregation been willing to share its resources to lift up the vitality of other congregations?
- Has our congregation turned our principal attention inward to only our own needs, to selfpreservation, to our own survival and well-being?
- Has our congregation become totally focused on maintenance of our current culture, our heritage, our identity, our own property?
- Has our congregation chosen to keep more or all of our financial resources for our own purposes?
- Has our congregation chosen to reduce or withhold mission support from the Southwestern Minnesota Synod and the ELCA?
- Has our congregation made decisions to draw down our endowment to support operations?
- Has our congregation made decisions to survive by renting space or property?
- Has our congregation been struggling in the midst of crisis for any reason?
- Has our congregation been suffering from a severe challenge?
- Has our congregation been unwilling to resolve a conflict in our midst?
- Has our congregation lost its way?
- Has our congregation deliberately pursued an orderly transition of any sort?
- Has our congregation been engaged in healing and reconciliation?
- Has our congregation put together a path that leads to stability?
- Has our congregation committed to make specific changes that can grow us into God's Preferred and Promised Future?
- Has our congregation decided how to respond to God's abundant gifts, especially as we acknowledge all of our assets?
- Has our congregation determined to engage boldly in a journey of transformation to more fully reach out into God's world to thrive and live actively to grow into God's Preferred and Promised Future by calling, equipping, and empowering people in service to others?

Your congregation's Strategic Planning Map

Following this time of many clarifying questions about your congregation's aspirations, an authentic, shared vision will eventually take shape among your members. One way to capture the essentials of this shared vision is to complete a **Strategic Planning Map**. A sample appears in the exhibits (page 27).

A Strategic Planning Map often includes the following items:

Strategic Direction

 This is often just a 1 or 2 line statement that summarizes the direction being actively pursued by your congregation.

- o For those congregations who have recently completed the Ministry Site Profile for a call process, this summary of strategic direction can be easily gleaned from that work.
- This statement is aspirational in nature.
- o It will declare the explicit path of growth into God's Preferred and Promised Future.

Mission Statement

Many congregations already have a mission statement. This often is done as part of a call process. Other congregations may find that their current mission statement needs to be visited again and refreshed. If this is the case, it is highly recommended that the work from the earlier missional planning steps be drawn upon to perform this task.

Mission statement work can sometimes become a bit tedious and time-consuming. Here are a few helpful tips.

- o The process tends to work more smoothly with a smaller committee of people who have been actively engaged in the earlier process steps.
- o Then, a draft of a new mission statement may be prepared for review first by the congregation council.
- o When the draft is ready, take it to the whole congregation so members may work with the mission statement and gain some personal ownership.

Warning!!! Potential thicket! Briar patch! Don't get bogged down in "wordsmithing" at this point! Once you've identified the key principles in your mission statement, give it to a smaller committee to perfect the wording while the Strategic Planning Map develops.

Guiding Principles

- o These are short statements that describe the values, culture, and behaviors of your congregation.
- o Congregations that have completed SOAR, gone through "Discovering Hope", or perhaps utilized another process like "Natural Church Development" work may already have such statements.
- o The ones shown in the sample in the resources (page 27) are commonly used.
 - Jesus is Lord.
 - All are welcome.
 - Everyone has a gift.
 - Practice grace.
 - Love changes people.
- o These statements are helpful in shaping how members behave, the actions they take within your congregation, how they practice hospitality to visitors, and how you undertake decision making.

• Key Areas of Mission & Ministry

- o This section contains the core mission and ministry work of your congregation.
- Key areas are specifically identified and labeled.
- Very specific, short statements are listed for each of 3 to 5 Key Areas.
- o A worksheet sample in the exhibits will be reviewed later in this process step.

Gauging Progress

- This section includes a 1-2 line summation of the quantitative, qualitative, and time-bound measures for each key area of missional planning.
- o Another process step will focus on this section.

Resource Stewardship

- Resources come in several forms: skills and talents of people, time, property, and a variety
 of funding streams and sources.
- o Another Growth stage-- "Aligning Our Resources"-- will explore this section further.

Principal Assumptions

• This section is intended to capture only key statements of conviction or assumptions that inform your congregation's missional planning.

Clarifying Key Areas of Mission & Ministry Goals: What now?

Earlier work on "Listening to Our Community" and "Identifying Our Assets & Possibilities" will have likely identified candidates for the **Key Areas of Mission & Ministry**. A worksheet for developing those **key areas** is shown in the exhibits (page 28).

This process can be conducted in smaller groups of 3 to 5 people per key area. Applying deep listening skills, the outputs can be reported out to the full group. The discussion clarifies the following information for the designated key area:

- Goal description and desired or targeted outcomes
- Key actions, milestones, and timeline to achieve the goal
- Measure that will be used to gauge progress
- Budget required to realize the goal
- People who can bring special skills and talents to fulfilling the goal

Work groups are encouraged to select no more than 3 goals for each key area. This helps avoid the perception of a cumbersome plan or too many goals to be achieved. All goals should follow the SMART description:

- Specific
- Measurable
- Attainable
- Relevant
- Timebound

Upon completion of the prioritized goals and outcomes, the work groups are encouraged to also consider likely or potential risks, obstacles, or constraints that can get in the way. Actually naming a risk or obstacle seems to make it easier for people to identify constructive, action-oriented steps to reduce or eliminate the potential impact. This becomes a time for creative, unbiased, innovative thinking and truth-telling.

Upon completion of all the Key Areas of Mission & Ministry, the primary goals can then be inserted into the **Strategic Planning Map** (page 27). On a one-page chart, all the key items can be more easily communicated and ready for regular use by your congregation council, committees, and congregation.

The content from the worksheets is also helpful for formulating a set of goals for the congregation, leaders, and pastor. A sample of such goals appears in the exhibits (pages 31-33). Again, to avoid the perception of a complex or unachievable plan, your congregation may choose to identify no more than 10 goals in a year.

Notes/Reflections/Ideas for Growth Stage 3:

Growth Stage 4: Aligning Our Resources

This stage requires a realistic understanding of the financial strength of your congregation and the full range of resources at your disposal. If your leaders and members continue to refer to their findings from the Scriptural discussions on how God is calling your congregation to grow into God's Preferred and Promised Future, the usual tensions about priorities and application of resources will be resolved more easily.

Where necessary, multiple financial models or alternative plans may need to be developed. These can account for variances in capacity, timing, or commitment to fulfilling the key areas of mission and ministry.

Your congregation council is encouraged to routinely review the full set of financial statements at each regularly scheduled meeting. This review should always include both your income/expense statement as well as your balance sheet. You are also encouraged to conduct regular forecasts of income and expenses to avoid unpleasant surprises. There are samples of financial statement, forecast, and balance sheet formats in the exhibits (pages 29-30). These documents enable wiser decision making, sharper focus for your stewardship planning, and responsible financial preparation for your mission and ministry.

Another technique is to prepare a narrative-style budget document with brief explanations of financial commitments to each key area of mission and ministry.

Financial reporting on member giving is also highly encouraged. Most congregations do this on a quarterly basis. Some congregations also conduct additional analysis and communicate the range and frequency of gifts as an incentive to all for growing personal stewardship.

Resource stewardship in your congregation can also mean lifting up opportunities for current or future planned giving, estate planning, endowments, and larger gifts. For example, in our rural environment, we sometimes have gifts of farm land. Your constitution or bylaw language may need to be changed to permit the creation and management of endowment funds for your congregation.

Recent information about the preferences of younger members for electronic giving and support for specific, tangible funding targets can be useful in your planning process.

People resources also need to be aligned. This includes the skills and talent of people who are on your congregation's payroll, as well as the structure and deployment of your volunteers. Ideally, any pledges of time and talent, typically captured during a stewardship appeal or consecration worship service, are matched up with the priorities and goals. Planned rotation can help overcome volunteer burn-out.

Growth Stage 5: Activating Our Plan

This stage in the overall process again calls upon your leaders and members to revisit what God is calling your congregation to be and do as it grows into God's Preferred and Promised Future. This is the time to test your commitment, not just to the planning process, but to activating your aspirations and goals to realize the intended outcomes.

You are highly encouraged to create a specific implementation plan and timeline to directly support all of the Key Areas of Mission & Ministry and accompanying goals. In addition to the goals for your congregation, leaders, and pastor, another technique is the creation of a *Strategy Fulfillment Map*. A sample appears in the resources (page 34). It is designed as a one-page compilation of all the Key Areas of Mission & Ministry, with starting dates and duration of critical actions.

This *Strategy Fulfillment Map* can be published for all members of your congregation to see. It can be used for regular discussions at your congregation council and committee meetings. Some congregations have chosen to use this map as a very large working chart posted in meeting rooms. Agendas follow the entries on the chart. Members are encouraged to raise early alerts on goals that may be at risk. This also presents healthy opportunities for discussing what actions are necessary to stay on track.

This is the time for accountability to each other and responsibly completing the missional plan to achieve the intended results. It is a time for cultivating and nurturing the plan as your congregation grows into God's Preferred and Promised Future.

Notes/Reflections/Ideas for Growth Stages 4 & 5:

Growth Stage 6: Gauging Our Progress

This stage requires periodic checks on the quantitative, qualitative, and timebound measures that your congregation has set for all your goals. It is a time to verify that your congregation truly is growing into God's Preferred and Promised Future. That may mean some course correction or perhaps choosing different methods of measurement.

Your leaders can pursue many different ways to help keep track and regularly communicate progress to all members of your congregation. Some ideas follow:

- Distribute the *Strategic Planning Map* (page 27) document to all members.
- Make financial updates that directly track to the missional plan and goals.
- Post or publish your congregation's and pastor's goals, with monthly or at least quarterly comments on progress.
- Weave key milestone achievements into your sermons, service bulletins, newsletters, and websites.
- Post the Strategic Fulfillment Map in your primary meeting room. Use it at every congregation council meeting.
- Create a scorecard of key measures. A sample is shown in the exhibits (page 35).
- Post colorful, creative progress charts with regular changes.

Other communication techniques can be helpful in sharing information about the mission planning process and your progress at every step. Some additional thoughts include:

- Conduct information meetings with your congregation at key points during your mission planning process. Invite their thoughts and questions.
- Publish the detail of the mission plan.
- Share regular progress reports with members, other congregations with whom you share any ministry, and your ecumenical partners.
- Complete a quarterly or mid-year review of all goals. Engage in mid-course correction as needed and announce those changes.
- Establishing regular sessions for the Three Great Listenings. Use these to gather comments, seek feedback, and offer creative new ideas for mission and ministry.
- Use your website, newsletters, email announcements, service bulletins, and social media connections to spread the news and invite comments.
- Seed key messages in sermons, Bible studies, and all learning opportunities.

Seize every opportunity to ask people how well your congregation is growing into God's Preferred and Promised Future. Are there other possibilities we can imagine?

Resource Persons to Support You

God has provided persons and organizations to support your congregation in "Growing Congregational Vitality." You are not in this alone! As St Paul writes, "I planted, Apollos watered, but God provides the growth." (I Corinthians 3) Here are some persons and resources to support you.

Southwestern Minnesota Synod

Bishop Jon Anderson
Jon.Anderson@swmnelca.org
507-637-3904 (Synod Mission Center)

Pastor Larry Strenge, Director for Evangelical Mission, Larry.Strenge@elca.org 507-637-3904 (Synod Mission Center); 320-249-1135 (Cell—main contact number)

Pastor Linda Pedersen, Synod Minister Crow River, Lakeland, Glacial Ridge and Great River Conferences <u>Linda.Pedersen@swmnelca.org</u> 507-637-3904 (Synod Mission Center)

Pastor Joyce Piper, Synod Minister Minnesota Valley, Watonwan River, Lac qui Parle and Scenic Valley Conferences Joyce.Piper@swmnelca.org 507-637-3904 (Synod Mission Center)

Pastor Andrea DeGroot-Nesdahl, Synod Minister Prairie and Shetek Conferences Andrea.Nesdahl@swmnelca.org 507-637-3904 (Synod Mission Center)

Reading and Website List

A volume of resources is being continually produced which may supplement "Growing Congregational Vitality." These include printed materials and web based resources. You are encouraged to explore some of the following:

- A Field Guide for the Missional Congregation: Embarking on a Journey of Transformation. Rick Rouse and Craig Van Gelder. 2008. Augsburg Fortress.
- Beyond Maintenance to Mission: A Theology of the Congregation. Second Edition. Craig L. Nessan. 2010. Fortress Press.
- Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations: Gil Rendle and Alice Mann, The Alban Institute, 2003.
- Living Lutheran: Renewing your Congregation, Dave Daubert, Augsburg Fortress, 2007.
- Living Into the Future Together (LIFT) 2011 Pre-Assembly Report Recommendations, Section IV, pp. 29-30 and Section V, pp. 24-25. www.elca.org.
- Ministry Site Workshop as part of the Pastoral Call Process.
- Mission Exploration Team (MET) as part of the Pastoral Call Process.
 - o See addendum of "Growing Congregational Vitality"
- The Power of Asset Mapping: How Your Congregation Can Act on Its Gifts. Luther K. Snow. 2004. Alban Institute.
- The Thin Book of SOAR; Building Strengths-Based Strategy. Jacqueline M. Stavros, Gina Hinrichs. Thin Book Publishing
- Vibrant Congregations Project, Luther Seminary, St. Paul, Minnesota, via a Lilly Foundation grant in 2011-2012. www.luthersem.edu.
- ZIP Code Reports and Congregational User's Guide. www.elca.org/research.

Other websites:

Southwestern Minnnesota Synod: Faithful and Fruitful Blog http://swmnelca.wordpress.com

ELCA website: The Congregational and Synodical Mission Unit (CSM) supports this site with resources being developed in synods of our ELCA:

http://www.elca.org/Growing-In-Faith/Discipleship/Mission-Planning.aspx

Southwestern Minnesota Synod **Missional Planning Process**

Sample SOAR Framework

Strengths of the Spirit

What has God placed in our midst that God can use us to build on?
What's working here?

Opportunities

What is God longing for us to see?
What are our longings as God's people working for God's mission?

Aspirations

What is God placing in your head or heart that you care deeply about?
What do we want to do as God reveals these opportunities & strengths?

Results

What one to three goals would you be willing to work on in the next year?

(Name of Congregation) Strategic Planning Map for (Dates)

Strategic Direction

(Name of Congregation) will foster a lively, Christ-centered environment that has authentic appeal to draw more youth, young adults, and families into intergenerational and multicultural fellowship and service to others.

Mission Statement

(Name of Congregation) is you and me. We are a people created by God and redeemed by the blood of Jesus Christ. The Holy Spirit empowers us to share God's gifts of forgiveness, love and eternal life. Our mission is rooted in Jesus' command to love one another. Inspired by the Holy Spirit, we reach out to our community, sharing God's free gift of salvation, seeking and welcoming all people into our fellowship.

Guiding Principles

Jesus is Lord All are welcome Everyone has a gift Practice grace Love changes people

Key Areas of Mission & Ministry

Preaching & Worship Leadership

- · Redesign Sunday bulletin.
- Add variety to the worship experience.
- Dedicate more resources to our music ministry.

Teaching

- Recruit new Sunday School teachers.
- Conduct short-term adult study opportunity every 6 months.
- Conduct a Congregation retreat.
- Adult education every Sunday.

Evangelism & Mission

- Increase name recognition & presence online.
- Create opportunities to support local college students.
- Create more family-friendly environment.
- Enhance coffee hour & visitor program.
- Maintain youth ministry.

Social Ministry

- Explore & leverage partnerships: Who's already doing this well?
- Sustain & grow current ministries: Food Shelf;
 Thanksgiving & Christmas gifts; CROP Walk; Adopt-A-Family; Prayers & Squares.
- Communicate volunteer opportunities proactively & intentionally.

Stewardship

- Increase unified giving by 10%.
- Improve communications concerning giving.
- Education for changing our mindset on stewardship.
- Estate-focused planned giving & endowments.

Gauging Progress

(Summation of quantitative, qualitative, and time-bound metrics for each key area of mission & ministry)

Resource Stewardship

(People, talents, time, property, funding)

Principal Assumptions

Congregation will achieve its annual budget. We will have a half-time youth minister. Property requirements will be managed.

(Name of Congregation)

Strategic Planning for (Dates)

Key Area of Mission & Ministry:	
---------------------------------	--

Item	Goal Description &	Key Actions,	Measure	Budget	People
	Outcome	Milestones, Timelines			_
1					
2					
3					
		Alternative or Additional	Goals		
4			douis		
_					
5					

SMART Goals: Specific; Measurable; Attainable; Relevant; Timebound

Item	What will get in the way?	Actions to Improve Results
1		
2		
3		

Sample Financial Statement & Forecast

Accounts	2012 Actual Amounts	2013 Approved Budget	Actual Amounts 2013 Year-to-Date	Forecast for Full Year 2013	Comments
Giving & Receipts					
Unified Giving					
Loose Offerings					
Designated Gifts					
Rents					
Total Giving & Receipts					
Expenditures					
Operations					
Utilities/Taxes/Insurance					
Office Supplies/Equipme					
Custodial/Building Supp	lies				
Reserves/Building Proje	cts				
Loan Principal & Interes	t				
Total Operations					
Payroll Expenses					
Benevolences					
Mission Support-Synod					
Designated Gifts					
Total Benevolences					
Programs					
Education					
Evangelism					
Stewardship					
		1	1	1	

Surplus (Deficit)			

Youth & Family

Total Programs

Total Expenditures

Sample Statement of Financial Position (Balance Sheet)

	Period Completed 12/31/12	Period Completed 10/31/13	Change	Comments
Assets				
Current Assets				
Checking/Money Markets				
Designated Funds				
Total Current Assets				
Fixed Assets				
Building & Land				
Other Assets				
Housing Endowment Fund				
Total Assets				
Liabilities & Equity				
Current Liabilities				
Accounts Payable				
Long-Term Liabilities				
Mortgage & Loans				
Total Liabilities				
Equity				
		·		
Total Liabilities & Equity				

(Name of Congregation) Congregation Goals for 2014

Itama	Coal Description	Time aline	Commonto
Item 1	Goal Description Stimulate growth in stewardship. Increase	Timeline	Comments
1	unified giving by 10%.	Full period	Education, planning, implementation & evaluation
	diffica giving by 10 %.		process; offer options for giving;
			planned giving for major property
			improvements
2	Engage more members & visitors with	Full period	Balance of traditional &
	wider variety & more music in inspiring	_	contemporary; hymn selection;
	worship experiences.		grow music programs;
			use art & technology
3	Collaborate with other churches and	Full period	Engage with other church councils;
	ecumenical partners in rural ministry.		define & pursue joint rural
			ministry programs.
4	Offer more & varied education	Full period	Pastor-led adult Bible studies;
1	opportunities for all age groups.	Tun periou	equip new teachers; church
	, P		retreat; all-ages VBS
5	Foster a more welcoming, family-friendly	Full period	Enhance hospitality & visitor
	environment.		programs; opportunities for
			fellowship; redesign/refresh
			worship & other spaces
6	Expand youth & young adult ministry to	Full period	Evaluate staffing level required;
	attract more participants.		support students from local
			colleges; food for finals; online
7	Lavanaga anga nantnanahing fan mana	Eull paried	presence
/	Leverage area partnerships for more social programs in rural mission &	Full period	Explore partnerships with LSS & others; grow current ministries;
	ministry.		create more volunteer
	ininistry.		opportunities
8	Identify networking opportunities for	Full period	Select topics; set up affordable
	sharing ideas among congregations at a	P	technology networks to minimize
	distance.		travel; create easy & fun follow-up
			opportunities
9			
10			

(Name of Congregation)

Pastor's Goals for 2014

Goals	for Senior Pastor (Name)			
Item	Goal Description	Timeline	Comments	Progress
1	To provide a well done, engaging and thought provoking worship experience.	Full period	Include more explicit critical thinking	7
2	To meet with every household at least once throughout the year	Full period		
3	To clarify expectations for staff performance to help pursue goals, and foster healthy working relationships.	Full period	Set at least monthly discussions	
4	To connect with area colleges to support our local youth and attract others.	Full period	Create events, discussion & support groups	
5	To strengthen our culture of stewardship.	Full period	Work with stewardship committee. Give multiple sermons on topic.	
6	To lead adult class on Sunday mornings and a week-night series.	Full period	Offer week-night series for teachers & choir who cannot attend Sunday mornings.	
7	To engage with the confirmation class in more critical thinking and rural service projects.	Full period		
8	To reach out to area rural social programs & seek ways the congregation can assist	Full period		
9	To actively participate in Southwestern Minnesota Synod activities.	As opportunities arise	Collaborate with other pastors in leading mission planning; continual education.	
10				

(Name of Congregation)

Youth Ministry Leader's Goals for 2014

Goals	for Youth Director (Name)			
Item	Goal Description	Timeline	Comments	Progress
1	Conduct joint confirmation program with X congregation.			
2	Teach Sunday Bible study for junior/senior high youth.	Full period		
3	Organize & conduct junior/senior high youth events, fundraising & service opportunities: • Rural social program volunteers • Flood control volunteers • Snow removal for shut-ins • Youth celebrations & gatherings • Shrove Tuesday Pancake Dinner • Winter retreat • Summer outings • Graduations, sports, music • Advent dinner	Per schedule or as emergency situations warrant		
4	Conduct individual youth counseling.	As needed		
5				
6				
7				
8				
9				
10				

(Name of Congregation) Strategic Fulfillment Map: July 2013 - December 2014

Key Areas	2013						2014											
of Mission & Ministry	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Preaching &			Acquire i	new sou	ınd syste	em												
Worship Leadership		Add vai	riety to th	ne wors	hip expe	rience.	1	1	1	1	1	1		1		1	1	
					Dedicate	e more re	esource	s to our	music m	inistrv.								
			Recruit &	equip ı	new Sun	day Scho	ool teach	ners for	l quarterl	y pre-K t	hrough a	l adult pro	ograms.					
Teaching			Cor	nduct n	l ew adult	study o	l pportun	ity ever	y 6 mon	ths.		Ongoi	ng new	studies.				
									Plan	& condu	ict congr	egation	retreat	for all a	ges.			
Evangelism			Increase	name r	ecognitio	on & pre	sence o	nline.										
& Mission						ortunitie						ns in rur	al outre	each.		I		
	L	Redefine	vouth m			collabor and visit			other o	ongrega	tions.							
Social			E	xplore 8	k leverag	ge partne	erships i	n neight	ooring co	ommuni	ties: Wh	o's alrea	ıdy doin	g this we	ell?			
Ministry		Sustain & grow current ministries: Rural social ministry; food programs; eldercare; prison ministries.																
			Comr	municat	e volunt	eer oppo	rtunitie	s proact	ively & i	ntentio	nally.							
					Incr	ease givi	ng by 10)%.				•						
Stewardship			Г	Improv	re comm	L unicatio	ns conce	erning gi	ving. Co	nduct e	ducation	n for cha	nging o	ur mind:	set on ste	wardsh	ip.	
					I Estate-fo	cused p	l lanned į	giving &	endowr	nents.								
Resource		М	id-yr rep	or Au	dit done			Rep	air wind	ows		1	Pla	nning &				
Stewardship		Repair	roof & g	utters	Т	Organiz	e snow i	emoval					1	lluation; d-yr repo	I			
	'	CI	ean sanc	tuary	Pre	pare an	nual rep	orts and	l quarte	rly finan	cial fore	casts; co	mmuni	cate stat	us to con	gregatio	on.	

(Congregation Name) Strategy Fulfillment Scorecard for (Date)

People We Serve

- Frequency of visits to members' homes
- # of meals served to homeless people
- # of school supplies and backpacks for children
- Frequency of visits to homebound/hospitalized
- Quality of educational experience for children, youth, and adults
- Quality of counseling/caregiving services
- Snow removal service for shut-ins

Operations & Processes

- Accuracy of parochial records
- Quality of financial recordkeeping processes
- Timeliness of quarterly & annual reports
- Completeness & accuracy of employee records
- Quality of performance management
- Timeliness & quality of property maintenance
- Clean audits

Financial Sustainability

- Rate of increase in giving per member unit
- Completion rate on financial pledges
- Growth rate of endowment funds
- Healthy cash flow management & balance sheet
- Accountability, %, and timeliness of mission support to Synod
- % allotment for reserves

People Who Serve

- Fair market compensation for rostered leaders & staff
- Quality Mutual Ministry support
- Timely & balanced performance feedback
- Timely acknowledgment of all gifts
- Completion of development plans
- Recognition for volunteers
- Frequency of rotation of volunteers

Ministry Site Workshop (a workshop in use in the Southwest California Synod)

This activity typically is conducted in one or more settings with members of your congregation as an early action within a call process. The results are consolidated and analyzed for use in preparing a Ministry Site Profile for your congregation. The data can be used in preparing interview questions about your congregation's priorities for pastoral candidates.

The **Ministry Site Workshop** can be described as a very large focus group and self-study process that invites people to respond in person. This is a great opportunity for breaking into smaller discussion groups or pairs to engage in deep listening techniques.

There are eight separate parts, noted below:

- Part I: First Thoughts and Impressions
- Part II: Evaluating Ministry Functions (your congregation's effectiveness in carrying out these vital functions today)
 - Worship
 - o Stewardship
 - o Learning
 - Witness
 - Service
 - o Fellowship
- Part III: Interim Priorities (specific priorities and goals for your congregation to act upon until a new pastor arrives)
- Part IV: Site Characteristics (12 sets of statements that describe your congregational life in four separate categories)
 - o Our community
 - o Our leadership style
 - Our programs
 - o Our theological perspective
- Part V: Trends in the Community Context (which can also include findings when a Mission Exploration Team process has been used)
 - Characteristics
 - o Context and changes within the past 5 years
 - o Trends within our congregation in the past 5 years
 - Current programs for mission and ministry
 - o Formal strategic planning and goals
 - o Energy level within our membership
 - o Partnership and participation within the ELCA and Southwestern Minnesota Synod

- Part VI: Priorities for Pastoral Leadership (high-medium-low rankings on 27 separate factors)
 - Select 5 top priorities for the future pastor to focus upon
- Part VII: Expectation for Pastor and Congregation
 - Priorities
 - Our respective roles
 - o Challenges or issues for the new pastor
- Part VIII: Other Hopes and Expectations (12 areas to prompt ideas and recommendations for your call committee to consider)
 - Preaching
 - o Leadership worship
 - Teaching
 - Visiting people
 - Providing care
 - Dealing with conflict
 - o Expanding evangelism and outreach
 - o Promoting and developing a stewardship culture
 - o Administering the business of our congregation
 - Leadership styles and preferences
 - Staffing relationships and interactions
 - o Participating in the Southwestern Minnesota Synod and ELCA churchwide activities
 - Other topics

Your congregation can derive many benefits as it completes this Ministry Site Workshop process. The deep listening and dialogue can begin to move members toward a common or shared vision for the future. The process also provides an opportunity to secure the points of view of people who often tend to be quiet, reserved, or avoid expressing their opinions publicly. Their insights can often be very helpful and illuminating.

You can begin to directly address the central question of what God is calling you to be and do as a congregation as you are growing into God's Preferred and Promised Future.

For congregations who have completed Ministry Site Workshops and the compilation of Ministry Site Profiles within the most recent 18 to 24 months, the data provided from that experience can serve as an excellent foundation for this missional planning process. Even then, however, it is important to engage in at least some effort to verify any significant changes that may have occurred in the meantime.