

BEST PRACTICES

For ELCA Campus Ministry

STRATEGIC PLANNING

“Strategic planning is an attempt to let future priorities have an influence on today’s activities.” Guy Saffold

Strategic planning is the process of determining how to get from where you are to where you want to be in as effective, efficient and faithful way as possible.

We all do strategic planning and do it on a rather regular basis. We do strategic planning when we prepare a meal, map out a trip, write a paper or shop for a gift. What is involved is a sense of what we want to accomplish, why we need to do it or make it, what it will cost, and who will be involved.

On a higher plane, we do strategic planning when we change jobs, build a house, move to another part of the country, seek another’s affections or birth a family. In these larger situations we have to think further ahead, involve more people, finance or pay a higher cost, and learn how to depend on reliable feedback.

While much of our lives involves planning, there is a time and purpose in the life of an organization to take planning seriously. Andringa and Engstrom list the following reasons to be involved in intentional, strategic planning:

- Survival
- Achieving the mission
- Reality check
- Focus
- Consensus and ownership
- Effectiveness
- Leadership review¹

Along with strategic planning, strategic thinking takes a high priority on the agenda of boards and those in leadership. In fact, if the thinking doesn’t happen, the planning probably won’t either. Strategic thinking is that energizing, uplifting activity that happens, often spontaneously, when people who care about an organization begin to dream about what they would like to see happen, without regard for cost, time, or effort.

¹ Robert Andringa and Ted Engstrom, *Nonprofit Board Answer Book* (National Center for Nonprofit Boards: Washington, DC, 1988) pp. 17f.

The ultimate goal of both thinking and planning is to stimulate action in the direction of the future, while maintaining faithful to the mission. Often the vision is simple and clear, unencumbered by layers of goals and objectives, at least in the outset. When leadership is committed to thinking into the future, strategic planning follows remarkably close behind. Leaning into tomorrow guides our actions today.

Where Does the Word “Strategic” Come From?

The word “strategic” comes from the Greek word for a military campaign **στρατεία** (2 Cor. 10:4; I Tim 1:18) or high-ranking soldier **στρατηγός** (Acts 16:20) or temple official (Acts 4:1). A derivative form, **στρατιώτης**, refers to a soldier or even a soldier of Christ (2 Tim 2:3). If one nation intends to wage war on another nation, it has to have a “strategic plan.” It has to know the power of the opposing army, the kind of terrain they will fight in, what the campaign will cost, what the end benefits will be, and who, in the end, will carry the cause into action. Throughout the campaign leaders will need to be aware of supplies, the energy and effectiveness of their troops and the counter movements of their assailants. A strategic plan has limits, expectations and consequences. It also has fluidity, interaction and the anticipation of failure; it is a dynamic process that must be reflected upon and adjusted by large and small increments as the campaign goes forward.

While the military metaphor may not be the best one for use in planning for ministry, it is helpful for us to consider all of the planning that goes into such a process and what the separate elements of this planning might encompass. Some of the reasons that organizations give for doing strategic planning are:

- Sharpen the organization
- Gain advantages associated with size
- Find a niche
- Simplify or downsize
- Focus on one or two success factors
- Engage the community as an ally
- Replicate
- Go after root causes
- Become entrepreneurial
- Become chaos pilots—helping the organization navigate rapid change
- Plan the mix of programs and funding²

While your ministry may choose to make changes or alterations at certain points, the basic elements of a good strategic planning process are as follows.

1. Get Organized

Before you begin, you will want to know who will share in the planning process with you. Will it be only your current board members? A new sub-committee? A select group of the board? Some organizations have found it helpful to involve someone from the “outside” who can bring a fresh perspective and creative energy. You may want to consider using a consultant to help you

² Strategic Planning Workbook, Amherst Wilder Foundation, p. 65f.

through the process. If so, check with other groups who have used consultants and get their recommendations. Build the consultant's fees into your overall budget.

If you and your ministry are new to the strategic planning process, you may want to work with a relatively simple and straightforward process, with a short-term vision of one year, to test out your readiness and gain some confidence. Then, the second year, make your reach longer and your plan more comprehensive. If your leadership cannot commit to forty hours of planning, begin with ten hours. Even some time dedicated at each meeting to certain aspects of thinking and planning will help you begin to nudge the long range process.

Be sure to get the commitment of all participants as you begin. Let them know how many meetings there will be, the time span of the project, and what they will be expected to do at these meetings. Let them know that it will be hard work, although it will also be rewarding and energizing. If you encounter resistance at this level, stop the process and address the concern before moving on. Persons in leadership must sign on for the whole process. Strategic planning cannot be solely the responsibility of staff. Accurate reporting and a sense that people's wisdom and work are valued and contributing to the new direction can strengthen commitment along the way.

2. Know your history

It is likely that a history of your campus ministry has been written in recent years, especially if you have had a significant anniversary event. If not, collect as much relevant historical information as you can, since you will need to refer to it in the days to come. Also, if you have written a "self study" or have had a quadrennial review recently, draw upon that as a way of helping your group get on the same page with the history and context of the ministry.

Also, it would be helpful at the outset to have a financial history available, charted out over the past ten years. Fund raising activities and endowment reports will also be valuable in assessing how far the ministry has come and how far it needs to go. Counting the cost in terms of dollars needed to implement your strategic plan will be an important step.

3. Analyze the Context

While a look at the past is important, a more critical need will be to examine the current context of your ministry. This is often called an "environmental scan." It is the terrain over which you must travel to accomplish your goals. It includes everything you can put your finger on that influences your ministry—the situation of the university to which you relate, economic or political trends, area church dynamics, and community situations to name a few. How do these elements affect your mission? Might they challenge you to do something new or different in response? How does the environment in which you serve influence your future for good or for ill?

You will also want to do an "internal audit" that will give you and your leadership a reading on the health and vitality of your ministry. What assets and resources are at your disposal? What kind of expertise is available? What facilities and technologies are at hand? What logistical support is available? What personnel resources do you have to get the job done?

It is often at this important, initial stage that many groups choose shortcuts that have serious ramifications later on. For example, if you are considering building a new facility, but did not know that the benevolence income in local congregations had dropped by 20 percent in the past three years, you might not factor this into planning your financial future. Or you may attempt a major capital campaign without assessing the need for staff, computer software and fund raising expenses. Your ministry is not an isolated entity, but inter-connected with the environment in which you serve. It is also likely that you will discover that you will have to do some tuning up of the old machine before putting it on the road. Good trip planning involves both a vision of where you want to go and the means to get you there.

There are a number of ways to do an environmental scan. One of the more common ways is known as the “**SWOT Analysis.**” With this method you ask:

- S What are the **strengths** of our current ministry?
- W What are the **weaknesses** of our current ministry?
- O What are the **opportunities** that lie before us?
- T What are the **threats** that we are facing?

The responses to these questions can be ranked in order of importance. Some issues may need to be addressed immediately, such as finances or staffing. Some might be important, but can be included in later plans. Look for connections and synergies. What issues are obviously interdependent? Are there groupings of issues, which, if addressed, could leverage the current state of the ministry?

4. Establish the Direction

Given all that can be known about your ministry at this point, both past and present, the group begins to draft a future direction for the organization. There are a number of crucial elements of this stage. Developing a **vision** for the organization is the keystone that will guide all other aspects of the planning process. The vision states where you want to be as an organization 5-10 in the future. It should be both challenging and realistic. The vision should be do-able, but it may stretch the ministry to accomplish it. It should capture the imagination and raise the collective pulse rate—maybe even make you ask if you are crazy to consider such a vision. The vision should be strong enough and persuasive enough to drive the ministry into the future.

This compelling vision will require that a number of other decisions be made to bring it to life. A whole subset of **goals** will need to be described. These are smaller pieces of the vision that, when you work at them one-by-one, move you ever closer to making your vision a reality. If your vision is to cross the river, the goals are the steppingstones that allow you passage. If you are going on a trip, you map out your direction by noting a series of highways, turns and even detours that will get you to your destination. Goals are short-term, financially feasible, deliberate movements that make the entire journey possible. Establishing goals may involve input from a variety of persons at many levels. For example, if part of your vision is to serve commuter students at your university, one of the goals may be to get to know staff on campus who work with these students. Another goal may be to invite commuters to become involved in the planning process. Another may be to spend time in places that commuter students frequent and find ways to conduct interviews with them. Goals are answers to how to get where you want

to go as a ministry. Goals are always malleable and subject to change, so that you stay true to the vision and mission of the ministry.

At this stage of planning **objectives** are often mentioned as a sub-set of the established goals. Objectives are simply milestones along the way that mark progress. They are achievable and definable, so that we know we have reached them and can then go on to other sub-steps. Sometimes the acronym **SMART** is used to describe objectives that are appropriate to the overall plan. They are **Specific, Measurable, Achievable, Relevant, and Time-based**.³ When your progress can be charted by SMART objectives, you will have a way to chart your progress, like crossing items off of a grocery list or pointing your finger at a new place on the map.

5. Check Out Your Plan

After many long hours and much insightful reflection, you are now ready to draft your strategic plan and share it with others who can give you adequate, accurate feedback. A planning process is always in flux, so it is helpful at this stage to know that you will be continually revising your work. In one sense, you will always be working from a draft. The first draft is probably best written by one knowledgeable person, who attempts to capture the vision, spirit and general direction of the process thus far. Then, through review sessions and subsequent drafts, a working draft will be launched.

This is an excellent time to involve those who may be beneficiaries of your planning. Reviewers can include university faculty and staff, area clergy, parents and students, and inter-faith colleagues. You will want to know if your plan is feasible. You will want to test your goal steps and determine if you have dealt realistically with financial implications. Feedback at this point will keep you from having to make serious corrections farther out or undo critical elements of the plan.

A draft of your strategic plan will include the following:

- ✓ A summary of the overall plan
- ✓ A vision statement, including the mission of your organization, in succinct form
- ✓ Core values or guiding principles
- ✓ A profile of your current ministry, including current programs, financial statements and staffing needs
- ✓ An analysis of the context
- ✓ Goals for short term implementation, including specific objectives for each goal
- ✓ Expected outcomes that are measurable and definable as success indicators
- ✓ Financial expectations, showing income sources and projected expenses
- ✓ Facility needs or requirements
- ✓ A timeline for implementing the plan
- ✓ Staffing needs, with a detailed listing of who is expected to accomplish what tasks
- ✓ A process for periodic evaluation

³ “A Short Course in Strategic Planning,” Farrel North, Arvada, CO, p. 7. Used by permission.

Realistically, no one strategic plan incorporates all of these items listed above in great detail. Select the items that will make your plan intelligible to an outside reader. Try to capture the spirit and general direction of your vision. Keep it simple and focused. Then, as conversation and thoughtful responses provide feedback, rewrite the draft until it becomes a plan that everyone in leadership can affirm and support. If an important new issue arises while you are editing your drafts, or appears in the future, take it into account when the next draft is written.

6. Implement the Plan

Now that you have developed the best possible strategy for moving your ministry ahead to accomplish your vision, you will need to implement what you have planned. It's time to move the boat out into deeper water—proverbially to “fish or cut bait.” If you have taken the time to move through the steps described above, you can begin with confidence and hope. Often the single biggest mistake is not acting on the plan you have developed. Too often quality plans are shelved for lack of courage. When this happens, all those who worked so hard to develop the plan are discredited and feel alienated. Also, many plans are time sensitive, so that to delay means missing the “kairos,” the opportunity to buy a piece of property or enter into a new ministry coalition, for example. Timeliness and strategy have a direct correlation.

7. Evaluate as You Go

Along the way you and your leadership will need to monitor the progress and keep evaluating your goal steps. Stay focused on the critical issues and don't get side tracked by oiling squeaky wheels. Like most everything else in life, your strategic plan is an exercise in probability. You are engaging in an experiment in creative change that seeks to move the forces around you and, in turn, is moved by these same forces. Ongoing feedback, information and analysis are part of keeping your strategic plan vigorous and on target. The same kind of collaborative insight that created the plan will keep you going. Participatory ownership continues to be important, as everyone in leadership watches, feels, tweaks, senses and re-directs the life of the ministry. Mistakes will happen; correcting these mistakes will keep you on track.

Summary

In summary, there are four critical ingredients in the development of a strategic plan:

1. Getting good ideas on the table
2. Making good decisions about how to proceed
3. Developing a shared understanding of and commitment to the directions chosen
4. Implementing a plan that has a heart.⁴

A plan with a heart allows all participants to speak freely about their hopes, their commitments and their frustrations. This kind of plan connects the heart with the head, helping all who are involved to own the process and to celebrate the victories. Ask this question: “Given our mission, are we heading toward the place we eventually want to be?” When the head and the heart agree, you are involved in strategic planning.

⁴ *Strategic Planning Workbook*, Amherst Wilder Foundation, p. 18