

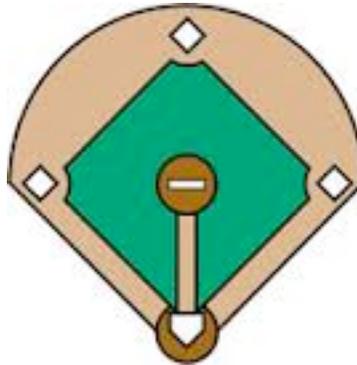
A Simple Planning Process

By Dr. Dick Hardel

For a congregation to grow in mission and ministry it is essential that the leaders of the congregation develop a vision [*a preferred future*] of where God is leading the ministry and mission of that congregation. From that vision the leaders should develop clear desired outcomes from which every ministry and mission of the congregation flow. With a vision and clarity of desired outcomes every ministry can be properly evaluated.

Ministry teams (in the 20th century we used the term “committee”) must develop action plans to accomplish the desired outcomes of the vision. Every action plan needs an Action Team and every Action Team needs to develop a Delivery Team. The Action Team plans and evaluates the event. The Delivery Team does the event.

For Action Teams I have designed a simple planning process, using a baseball diamond design to help the Action Team remember the process. This process can be done over a retreat or two or three different meetings.



Far too many planning teams of congregations begin with the wrong question. They often ask, “What shall we do?” Some even spend hours discussing what they should not do. This is one reason congregations become trapped in doing many of the same events and wonder why they do not accomplish desired outcomes of the vision. Much like the game of baseball, to get home one must first walk or run to first base. The place to begin the planning process is first base.

First Base: Assumptions



The first base question of the first step in the planning process is to ask, “**Who are we?**” A planning team should begin by checking out basic Assumptions of identity and the uniqueness of the faith community in which they are invested.

This can be done by brainstorming with the planning team. Brainstorm all the Assumptions of “who the members of this faith community are?” When Assumptions are clearly identified, it becomes easier to move to second base.

There are other creative ways to check out Assumptions. I would suggest that the facilitator write all the Assumptions of the congregation on a large piece of newsprint. The advantage of newsprint over the use of a white board is that one can always bring the Assumptions listed back for everyone to see. Certainly one could use a computer also. When one uses brainstorming, the facilitator might ask for a further description or more data about the Assumption mentioned, so that the assumptions are clearly understood by everyone. As the planning moves around the bases, more Assumptions could be added.

Second Base: Clarifying What We Need



After clarifying all the assumptions of “who the faith community or congregation is, the question of second base is: “**What do we Need, based on our assumptions, to accomplish what God has called us to do in the vision?**” This cannot be done without a careful look again at the Assumptions. The facilitator should always clarify the difference between Needs and wants. Again, the focus of second base is what is Needed to accomplish what God has called the congregation or faith community to do. The facilitator will keep the members of the planning team focused on the Needs. Often planning teams become anxious to begin listing activities. There are a variety of ways a facilitator can engage the planning team in expressing Needs. Again the Needs should be recorded by a scribe using a computer and also printed on another sheet of newsprint. The Needs will help form the desired outcomes of third base.

One process of discovering Needs is to use cloth, a coat, or a jacket, or other objects. Invite each participant on the planning team to demonstrate a specific Need without using words and by using the object. The others express what they think the Need is that is being acted out. After the Need is correctly identified the scribe records it on the newsprint for everyone to see. Again, it would be helpful to also record this on a computer.

Another design to discover the Needs would be to give each participant a piece of paper and instruct each to write down ten most important Needs for this event. Next, invite the participants to pair up with a partner and to see which Needs they have in common and to add to their list Needs expressed by the partner that were not in common. Then ask them to form groups of four and repeat the same process. If there are enough people on the planning team, ask them to join another group of four and repeat the process. Then have each group share two of the most important Needs expressed in their group. Continue asking each group and keep going around from group to group until all the Needs are expressed and recorded. Invite the planning team to look at the entire list and invite them to express some Needs that might have been overlooked. Record them. When all the Needs have been expressed and recorded, move to third base.

Third Base: Desired Outcomes



The question of third base is, based on the needs, which are based on the assumptions: **What is our target? What are the desired outcomes of goals of this event? We are doing this event so that what?"** It is essential to have clear Desired Outcomes of Goals to plan the activities of an event or an action plan. Again, the facilitator should keep the planning team focused on the questions of third base so that the planning team does not try to skip third base, and start listing activities.

The clarity of Desired Outcomes for an event is extremely important to keep the event on target. It is also very important when doing the evaluation following the event.

To determine the Desired Outcomes or Goals for the event, I have often used the process described above as an option for the activity of second base. Begin with each person on the planning team writing down two Desired Outcomes for this event to be on target with the vision for ministry and mission of the congregation. Then invited them to share in dyads or pairs, next in fours, and finally in groups of eight. Then list the Desired Outcomes on the newsprint and record it also on a computer. Make certain that all the members of the planning group understand and agree on the Desired Outcomes. Review the Needs again and the Assumptions again to see how they are connected to the Desired Outcomes. After that process, move to home plate.

Home Plate: Activities



With clear Desired Outcomes that are based on the Needs, which are based on the Assumptions, it becomes much easier to be creative in designing Activities, which are all done to accomplish the Desired Outcomes.

I would suggest using brainstorming to come up with a variety of possible Activities or Events in order to accomplish the Desired Outcomes. Often using this process, the planning teams list more Activities than could possibly be done in a one-year schedule. So invite the members to prioritize the top 6-10 Activities. Then choose which ones will be done.

These Activities are then flowed into a time chart of the event or of the yearly schedule. Often it works best to do the time chart backwards from completion to start and even pre-start, which includes publicity and marketing.

The Bench or Delivery Teams

The facilitator will invite the planning team to list the names of members of the congregation or faith community who have the skills, the faith, the passion, and who would be willing to take on specific leadership of activities for this event as planned. **Decide on a member of the planning team who will be responsible that this event is carried out as planned and evaluated (base paths between all the bases and home plate).** Invite the members of the planning team to each call some of the people listed as a possible Delivery Team for this event. After discussing the Desired Outcomes and Plans for this event with the candidate for the Delivery Team, the planning team member should inform the person chosen as responsible in making this event happen, so that all the leaders needed for this event have agreed and are informed what is their specific task, how long is their task, and how they will know they have completed the task. (I would suggest even establishing a Prayer Team for each member of the Delivery Team and the Responsible Planning Team Member).

Evaluation: How Did We Do?

Success of an event should be evaluated according to the accomplishment of the Desired Outcomes of the event. The question to ask a group of participants after showing them the desired outcomes of the event is: **“How close to the target (desired outcome) did we get?”** When one missed the target, it is important to run the evaluation base paths backward. Begin by asking, “Did we have faulty Desired Outcomes? Was the faulty Desired Outcome based on a missing Need or an unclear Need? Was there a Need missing or not expressed because we did not check out all of the Assumptions or did we have an incorrect Assumption? What have we learned? How can we do it better?”