

Three reasons why Planning & Ministry Review is critical for the church today:

1. Planning & Ministry Review increases the overall health of a congregation by increasing communication, group discernment, unity of vision and maximizing overall resources.
2. Planning provides direction and clear vision while maintaining flexible boundaries. Planning also encourages creativity, passion and engagement. Review helps ministries to stay the course. Ministries without regular review tend to “drift”. They become ineffective, shaped by leader personalities and other driving forces rather than reflecting the community’s unified vision.
3. The best way to ensure positive change in any capacity is to pay attention to the actions that make an impact on the desired change. In successful change efforts one must be conscientious of the change desired and of progress towards the final goal. This is true for both individuals and organizations and is done by observing, listening and looking at relevant data.

The key for churches is to instill practices of discernment and decision making that take into account critical information at every step along the way. A typical cycle begins with a broad assessment that is repeated to some extent every 6 to 12 years. Using information from the assessment, church leaders develop and communicate the vision and goals. A ministry review is repeated annually using information from feedback and accountability processes that are put in place during the first year of the cycle.

Steps in developing a Planning & Ministry Review Cycle:

1. **Formation:** Christian education classes on related topics provide the theological underpinning for Planning & Ministry Review. Classes rooted in scripture will reinforce changes in how decisions are made and help develop overall buy-in. They may begin prior to, alongside or immediately after the assessment. Some topics related to planning and review include:
 - Scriptural studies of covenant and accountability
 - Stewardship of time, talent and treasures
 - Benedictine concepts of change, stability and obedience
 - Personal and group discernment – worship, prayer, listening and responding
 - Leadership development and emotional maturity
 - Denominational specific education
2. **Assessment:** The purpose of the assessment is to give congregational leaders the information needed for decision making and to begin building a culture of observing and listening.

There are a number of things church leaders will want to learn from the assessment. This information is gathered from several sources including church records, online data sources, individuals who attend church (members, regulars, newcomers, and leaders), staff and clergy. A church may also want information from people in the surrounding community who do not attend your church.

Assessments may include any combination of the following methods:

- CAT – the Church Assessment Tool: this is a congregational survey, provided in partnership with Holy Cow Consulting, Inc. (<http://www.holycowconsulting.com/Churches/CAT.htm>). The completed CAT offers a Vital Signs Report identifying critical areas to be addressed in the planning process. Churches working with GTM will receive a special package including the step-by-step instructions to ensure a strong survey response, a Vital Signs Report, consultation all along the way and interpretation of the Vital Signs Report by GTM's CAT -Licensed consultant.
- MRS – the Ministry Review Survey: this is a short form to be completed by all ministry coordinators or facilitators. Designed on an appreciative model, the MRS assesses the strengths and resources of your current ministries.
- Small group listening forums—gatherings may take place in homes or the church. Each group has a trained facilitator and recorder. Structured questions are used to guide discussions.
- Financial statements from the past 5 years including income and income sources (pledged giving, plate offerings, endowments, grants, denominational support, etc.); operating expenses; capital expenses; obligations and commitments (denominational commitments, grants given, other project commitments).
- Attendance and membership data from the past 5 years including participation of all age groups in worship, formation/education programs, outreach projects, and other events or programs.
- Census and other data from your local community.

The assessment process takes about 4-6 weeks of gathering information and concludes with a congregational meeting where assessment results are presented. Members of the congregation are given an opportunity to listen, discern and offer input into the next step of visioning and goal setting.

3. Visioning and Goal Setting: Once leaders have spent some time digesting in prayer the assessment results and feedback from the congregational meeting, the team will be more than ready to move forward to visioning and goal setting. This process usually takes place during a retreat that includes worship, prayer, listening and discovering God's call for your congregation. When working with a thorough assessment and when enveloped in worship, prayer and listening, the vision will bubble to the surface for your discovery. Referring again to all the information that has been gathered, goals can be developed in the context of a continuous feedback and planning cycle.
4. Creating a Cycle of Observation, Feedback and Planning: Supporting a growing culture of observation, feedback and planning requires strong and committed leadership, education and patience. Depending on the size and traditions of the congregation, this process may be more or less formalized. Simple methods of feedback and listening processes can have a huge impact on communication practices. The result is more informed decisions, more participation in ministry and more creativity in developing ministries that bring the vision into reality. Uniquely developed for each congregation, these methods could include any of the following:
 - Annual mutual ministry reviews (annual review of goals and all ministries)
 - Identification of the appropriate group or groups to receive ministry updates, reviews or other feedback (possible groups: governing body, ministry council, clergy, whole congregation, etc.)
 - Regular ministry summaries for church leaders or congregation

- MRS – Ministry Review Survey completion every 1-2 years or another type of quick ministry assessment with a report to the appropriate group
- Regular publication of ministry successes and needs
- Development or revision of print materials with a regular process for review
- Full review of all communication processes to streamline and target the flow of information
- Development of a ministry council that assists in coordinating all ministries, developing new ministries and supporting existing ministries

With continuous feedback and listening processes in place, the planning cycle moves from the implementation year into a typical annual flow. During the typical year the focus is on maintaining processes and formation classes while carrying out ministry activities related to annual goals. At the close of a typical year, a mutual ministry review is completed and annual goals are set or reaffirmed in relation to the vision for the upcoming year. As a church looks into the future, it is helpful to set long range goals, as far as 10-15 years out then more strategic goals may be set for 3-year time frames and tweaked during the annual review. An assessment year is designated, usually between year 6 and 12. An assessment year is when the comprehensive gathering of information is repeated, the vision is revisited and new goals are established. The length of time between assessment years may be determined by the size and culture of the congregation and the level of formality given to continuous and annual review during the typical years. Major changes in the life of the congregation or clergy transitions may also initiate an assessment and revisiting the congregational vision.

Growing Together Ministries consultation resources for developing a Congregational Planning & Ministry Review Cycle - GTM creates a unique package of services in collaboration with congregational leaders. Below is a typical package for the initial year including a full assessment and development of continuous feedback processes.

The Initial Year Consultant Package includes a full assessment, coaching throughout the year, congregational meeting and a retreat for congregational leaders. The package includes the following services during a 12-month period:

- Six on-site planning meetings, trainings or coaching conferences
- Five phone or web-based meetings, trainings or group conferences
- Up to 20 hours of individual coaching for clergy or lay leaders related to planning and ministry review
- CAT survey with vital signs report and interpretation
- MRS survey with report and interpretation
- Financial, attendance and surrounding community data analysis
- Congregational meeting
- Two-day visioning/goal setting retreat
- Planning Cycle report
- Vision & Annual Plan communication brochure
- Planning and Ministry Review Cycle document
- Assistance in developing a Ministry Council, a complete communications review with recommendations and assistance in developing a new ministry discernment process

Subsequent year consulting typically includes 1-3 on site check-in meetings, trainings or coaching conferences, a facilitated retreat for Mutual Ministry Review and up to 12 hours of individual coaching for clergy or lay leaders related to planning and ministry.