Introduction

This document explains a rather advanced form of planning. It may not be suitable for parishes that before have not done professional planning. However, for those parishes for which it is suitable, many blessings and benefits may be received by undertaking the process.

The point of planning is to look at where the parish is at, determine where the parish needs to go, and figure out what it will take to get there. After gathering and analyzing data of various sorts, and involving people with a range of wisdom and perspectives, a parish can chart a course toward achieving its mission. Strategic planning is a necessary, but often not a sufficient, component of a nonprofit planning process.

The term *multi-dimensional planning* is used to describe a composite of planning activities that together provide the structure, direction and guidance needed by a parish. While the composite will vary in different situations, an understanding of the principles and framework for multi-dimensional planning will help to make each of the components easier to value, pursue and implement effectively. At the core of multi-dimensional planning are strategic, program, and operational (the graph uses the phrase “operation planning”).

The term "strategic planning" gets thrown around very loosely in the nonprofit world, to cover a wide variety of intentions and activities. The intentions are often poorly defined and/or ill-
suited to the activities. The resulting lack of focus and eventual failure of the process leave participants with a negative impression of planning.

For many parishioners, especially parish council members or members of the strategic planning committee, who come from the world of operation, strategic planning retains the rigid, top-down, market-driven, bottom-line- focused associations of its corporate roots. In the nonprofit sector, strategic planning requires a very different profile.

Here, it is fundamentally broad-based consensus- building around mission and goals. While strategic planning is one of the primary fiduciary responsibilities of the parish council, at its best it draws all parishioners into a discussion that reinvigorates a sense of communal purpose, and develops strategic thinking, focus, and leadership at all levels, as well as defining goals and actions.

**Program and Operational Planning**

Despite differences of strategy, a nonprofit does have the same underlying existential needs as a for-profit enterprise would have. Services and programs (products) must be developed with professional expertise. Revenues from one source or another must exceed expenses if the parish is to survive. Since the inclusive, consensus- driven process of nonprofit strategic planning is not well suited to the expertise-driven nature of for-profit business and program planning, they need to be separate undertakings.

Program planning develops services, programs and delivery mechanisms, and identifies the resources needed to implement them. While these concerns intersect with strategy and operational issues, they are at their core the responsibility of the priest and in larger parishes, the professional staff. A program plan may well be reviewed at the policy level by the parish council, but it should be developed by the priest or staff and organization or ministry leaders who report to the priest.

An operational plan details the means by which the parish is to be supported and sustained, determines operational feasibility, and provides the staffing, financial and operational details required. Operational planning typically is the responsibility of the priest, and sometimes the parish council.

**The Planning Cycle**

The three core areas of planning approach the same essentials from different angles: strategic planning addresses the questions of “Why?” Program planning addresses “What?” And operational planning addresses “How?”

Since there is clearly overlap among them, it’s possible to start with one and strengthen it further when the others are developed.
For a parish with no experience in planning, a very quick strategic plan may be able to provide the context for more detailed program and operation planning. After these are in place, the parish can cycle back to a more extensive strategic planning process, perhaps a year or two later.

Ideally, all three plans are needed, but trying to develop them in one undifferentiated process by a single group of people will generally be unwieldy and frustrating and will leave some or all of the planning compromised.

A regular, multi-dimensional cycle of strategic, program and operational planning reinforced with the peripheral supporting areas shown in the diagram can foster a culture of planning, in which the efforts of the entire parish converge through strategic thinking on critical issues. While there are other areas of planning that could be factored into a multi-dimensional planning composite, the core and peripheral areas included here cover most of the usual ground.

**Fitting the Pieces Together**

Often strategic planning is used as the umbrella activity. This can be done in any number of ways. Goals, objectives and measurable actions from the program and operational plans can be added as separate sections toward the end of the strategic planning process. Or there may be shared objectives that can be merged into a single document. Different functional areas (stewardship and fundraising, human resources, technology, specific programs and services) may develop annual plans that support and annually refresh a multi-year strategic plan. Each of these approaches to integration makes the strategic plan the shared connector between mission and metrics.

The idea of an multi-dimensional plan is primarily recognition of connectedness. It is not enough to be excellent at planning and implementing operations within an individual function. An all-too-common weakness in a nonprofit is the lack of coordination among finance and fundraising, membership and communications, issues and infrastructure. The best case in point is that a facilities audit is conducted, calling it a strategic plan, then jumping into a capital campaign once the need for a new building or major renovations is qualified.

Working together is not easy. But it is likely to be much more effective. An multi-dimensional planning process can lead the way to other synergies.

**The Peripheral Elements of Planning**

Around the core areas of strategic, program and operational planning are other, related activities, with discrete needs and processes, which knit together to form the multi-dimensional planning composite.
Parish Development: The effectiveness and sustainability of any parish is dependent on the quality of its governance, leadership and management. A well-conceived and conducted strategic planning process serves as an excellent vehicle of professional development for the priest, the staff, key volunteers and the parish council.

Identity and Branding (secular terms more closely akin to mission and public positioning in the arena of parish life: Attention to mission, vision and values can sharpen strategic thinking, develop underperforming potential, and foster operating stability and increased visibility and income. The strategic planning process that includes revisiting of the mission, vision and values statements generates the foundation of parish identity, which in turn forms the basis for advancement planning (“advancement” typically includes parish council development, fundraising and membership growth through outreach and evangelization.)

Advancement Planning: Sound planning and strategy are critical assets for success with institutional advancement. Strategic planning often provides the basis for compelling fundraising projects and the case for a capital campaign. Plans for membership growth, communications and fundraising are essential aspects of the operational plan.

Human Resource Planning: The strength—and the budget—of a parish are substantially invested in the people. A broad range of issues from personnel policies to professional development should be articulated in a clear plan that will solidify leadership and management, minimize risks and provide continuity. Human resource issues form critical elements of program, operational and strategic plans.

Technology Planning: A generation ago keeping pace with new technology was primarily a challenge to the budget for hardware and software. Now it is more of a challenge to strategy, understanding of a rapidly evolving environment, staff time, notions of control, and finding ways to connect these issues across the age gap between senior leaders and the wired members of the community. Technology planning needs to be developed across disparate functional areas and to be imbedded in all three areas of the planning core. This requires a multi-pronged approach and a keen awareness of the importance of all of the planning efforts within the parish.

Facility Planning: Facility projects require focused attention long before an architect is hired—and long after. Multi-dimensional planning can assure that design and construction are preceded by clarity about goals, needs, budget and controls required to reduce costs and risks and deliver the best possible results. Next to staff, facilities are usually the biggest investment a parish makes, and the least flexible. While all of the other areas are part of a cycle that can be entered and left at any time, all of the other planning areas need to be as up-to-date as possible before a facility project can be planned wisely.