

The Basic Parish Strategic Planning Process in Ten Steps

There are levels of parish strategic planning complexity. It's best for parishes undertaking this process for the first time to utilize a simple process. If strategic planning is done every 3-5 years, the parish council and staff will get better and better, the process becoming deeper and more comprehensive as more information and experience is accumulated through the years. Remember that undertaking the planning process is *at least* as important as the final written product – the key leaders and indeed the entire community undergo deep reflection and conversation on the very purpose of parish life according to the gospel. It serves as an effective, even profound teaching process.

Who are we?

1. Create, review, change or affirm as necessary the parish's mission, values and vision statements.

Where are we now?

2. Analyze the recently ended plan (if one exists) and the programs, financials, and leadership (both parish council and priest) performance of the parish.
3. Assess programs, ministries and organizations – delete, transform, strengthen, create? Survey community needs and aspirations.
4. Assess limitations, opportunities, resources and other aspects of the external environment that will affect the parish and shape the planning.

What do we wish to become? (the essential question of strategic planning)

5. Revisit the mission, values and vision in light of new information and revise, if necessary.
6. Write and “test” goals and objectives based on the information gathered in steps 1-5.

How will we get there?

7. Develop a financial plan and budget to support the tested goals and objectives.
8. Write an action plan for each objective, including exactly who will be responsible for implementation of the objective.
9. Prepare the comprehensive plan for review, approval and implementation against a calendar.

How are we doing?

10. Parish council and priest evaluate progress and update plan on a regular basis.

Note: If a five-year plan, the relevance of the plan depreciates 20% each year, though some critical elements will be 100% relevant throughout the entire plan.

The typical contents of the written strategic plan:

Theological: Mission, Values, Vision

Mission: The purpose for which the parish exists and a brief summary of what the parish does

Values: Describes the *manner* in which the parish/community conducts itself

Vision: Describes the mission of the parish in future terms and describes its impact in the future (the next generation?)

Strategic: Goals

Goals: Aspirations prayed for, and accomplishments worked for (programs, leadership, values, facilities, finances, etc.)

Tactical: Objectives, Actions, Funding, Staffing, Technology, Calendar, Evaluation

Objectives: Specific, measurable, attainable, results oriented

Actions: Tasks

Funding: The amount and source if funding is required - new funds, budgeted, capital, endowment, sponsored, etc.

Staffing: Who will be responsible? How will the office staff and volunteers work together?

Technology: Sufficient? Updating required? Expertise available?

Calendar: Timeline with benchmarks over the period of time addressed by the plan

Evaluation: How will we monitor and amend the plan as necessary? How will we hold ourselves accountable both individually and corporately?