

# Strategic Oversight of the Parish

How can a parish church give adequate attention to strategic issues? How can it provide for needed strategic oversight (leadership and management) so that strategic issues are dealt with while also attending to the routine life of the parish?

The most common reasons strategic issues are not adequately addressed are:

- Lack of clarity about what is “strategic.”
- The normal processes of parish life create a focus on the routine business of the parish that takes up all the time and energy of the people providing oversight.
- The rector fails to accept primary responsibility for the oversight of the whole and for establishing the processes and structures necessary to effectively implement that oversight.

Let’s talk about the last of these first. There are two units within a parish with the *authority to initiate* strategic action—the rector and the vestry. That is to say, one or the other of these units needs to authorize such action—either by the decision of the rector, or by the vote of the vestry.

Others may do the needed monitoring and thinking-through work needed, either separately or in consultation with the rector and/or the vestry. What’s critical, though, is that those with the best sense of what is actually strategic, and the best sense of the system’s overall needs, both own the desired outcomes and pay attention to how those outcomes will be achieved. They won’t happen spontaneously.

Vestries are usually unable to provide the needed time and focus to think through strategic issues adequately. They are too large and rarely have the needed experience and training. For most vestries, getting together for a couple of hours a month to fulfill the canonical requirements around buildings and finance is difficult enough. Adding in the depth of knowledge and focused time needed to carefully assess, plan, and implement strategic initiatives is simply unrealistic for the vast majority of vestries.

This is where the rector’s leadership is particularly crucial. In managing the variety of pressures and expectations that surround parish life, there must be adequate time and attention given to strategic issues. This typically means having a smaller group focus more time on strategic concerns. This is in contrast to mostly futile attempts to make the entire vestry strategy-focused through training and lots more time spent in meetings, or to an assumption that the parish will get a different result by continuing to do things exactly the way they’ve been done before because we now bemoan the fact that the vestry needs to get more strategic.

Two things are inescapable: the need for more skill and the need for more time.

The vestry overall can learn basic skills (e.g., knowing the business the parish is in) through retreats and interweaving some core concepts into the vestry’s life. The rector, in her role of presiding at vestry meetings, can easily make this happen. But for sustained focus on strategic matters, it’s almost always better to identify two or three people with existing competence as well as passion in this area and set up a kind of strategic sub-committee or task force. Go with the energy and go with the gifts.

As for more time, there’s not a way around that but it’s generally easier to schedule more time when you’re dealing with fewer people (three, not 12, for example) and with folks eager to do the work in front of them.

The rector needs to take the initiative to identify the structures and processes that will be most effective

in this particular parish, and then go about the work of making it happen. Invite the right people. Set up frequent, regular meetings. Assess how things are going and what needs to be done differently going forward. Report back to the vestry regularly so they know what's happening and incorporate the broader strategic initiatives into their own routine understanding of parish life.

## What “strategic” means

### **Long-Term and Important Improvements: seeing and working on what's truly important and developmental, though not urgent**

We're seeking four general goals as we intervene in parishes to make them healthier communities and institutions. These goals are intertwined in any consideration of strategy.

1. Long-Term and Important Improvements: seeing and working on what's truly important and developmental (though not urgent).
2. Critical Mass: developing enough weight around what's important and developmental (though not urgent).
3. Internal Commitment: developing ownership around what's important and developmental (though not urgent).
4. A Parish Culture that is grounded, integrated, resilient: a culture that supports what's important and developmental (though not urgent).

Clergy and lay leaders all too often pour themselves into (and burn out from) efforts that fail to have much impact. The rector works hard for ten years and within a year of the arrival of the new rector there is very little left of what the prior rector worked so hard to achieve.

Leaders spend a great deal of their time on the routine business of parish life. We celebrate sacraments, provide pastoral care, and notice where the roof leaks. We create new programs, reorganize committees, and develop vision and mission statements. That's just going to happen. Much of it is necessary. It's only a problem when we never get around to the important work, the work that really develops and transforms a parish community.

A good test around this is the issue of urgency. If something feels “urgent,” it is generally not developmental. It may be important or even necessary, but it won't move things along. It won't take the parish deeper or create sustained improvement.

What is immediate and urgent drives us, while the truly important developmental work waits for when we have more time. People will complain about urgent matters; they likely don't even have developmental concerns on their radar. Our parishes, and especially parish leaders, need to see what's important and need to know how to provide adequate attention to that. More on this will follow in the section below on “demand systems.”

Diana Butler Bass wrote, “The primary job of church is to be a spiritual community that forms people in faith.”<sup>1</sup> That's a statement about the primary task of the parish church. Understanding the primary task of any organization is the starting place for being strategic. Another way to say that is that our primary task cannot be separated from worship, which is the clearest and most ubiquitous way we have to form Christians in the Episcopal tradition.

The second step is to invest resources of time, energy and money around the primary task. This means creating ways of being *effective* in doing that work. It also means avoiding a tendency to squander scarce

resources on things that don't much matter. Among the things that are really strategic for the parish are—developing the capacity of members for spiritual life and emotional intelligence; building the capacity of the parish leadership for managing change; relationship building; thinking about where the parish can be in a few years; noticing new opportunities as they emerge; people development; accepting responsibility for our own Renewal-Apostolate cycle as part of the parish community; and facing into crises that are truly about parish survival (as opposed to simply making everything a crisis).

Following are examples of strategic and non-strategic approaches to the same presenting issues.

**Presenting Problem: Sunday is overcrowded with activity and has a rushed pace.**

Examples of Non-Strategic Response	Possible Leader & Community Assumptions
<ul style="list-style-type: none"> <li>• Add <i>more</i> meetings on Sunday in an attempt to “break things up.”</li> <li>• Shorten the liturgies by picking up the pace and focusing on timelines, rather than rhythm and grace (“We’re done every Sunday in an hour on the dot!”)</li> <li>• Tinker with the schedule – try to put adult ed between services and then try to have it after the main service. Then give up and try a combined coffee hour.</li> <li>• Exhort people to “make Sabbath” while not doing anything differently.</li> <li>• Exhort more people to sign up for various Sunday tasks so we can more fairly “share the responsibilities of our common ministries.”</li> </ul>	<ul style="list-style-type: none"> <li>• There is parish work that is more important than worship.</li> <li>• Parishioners won’t come to events that take place on days other than Sunday. We are “spiritual” on Sunday; we are focused on “real life” the rest of the time.</li> <li>• The more people involved with institutional tasks, the “healthier” the parish is. Everybody needs a job.</li> <li>• Our time together at coffee hour is unnecessary or only important to the extent it helps us sign up newcomers for parish work.</li> <li>• The number of adult formation opportunities is more important than their depth, quality, or their connection to genuine formation.</li> <li>• How busy we are is a good indicator of how committed we are.</li> </ul>

These responses are not necessarily “wrong,” although in most cases, exhortation is mostly guilt-inducing, and guilt-based approaches to improvement are ineffective at best, and usually counter-productive. The real problem is that the responses are too simplistic, are directed at the symptoms rather than root cause and sustainable improvement, and they tend to focus on “technical” fixes rather than “adaptive” changes. In other words, they don’t shift what questions are asked, what we use as the measures of success, or how the overall community approaches and owns these issues. Ultimately, they are focused on better aligning the system to the problems, rather than transforming the system.

For example, some parishes do let their liturgies drag on too long. They may incorporate idiosyncratic elements that strike newcomers as “off,” or they may try to do too much and seem a bit scattered or frenetic. The solution to that, though, is to consider the overall flow and shape of the liturgy, the practices of the wider church (including what the Prayer Book says), and to consider the formation questions the “off” elements may have been trying to get at, not to impose an arbitrary time limit on the service. Doing this also means having to inquire into, make some guesses about, and ultimately address the underlying assumptions of the parish. That is a more complicated endeavor than telling the organist to keep all the hymns to three stanzas.

In approaching this strategically, it is important to evaluate the issues in terms of what we’re trying to accomplish and then establish strategic goals that will (1) move things along toward an improved state that is (2) aligned with the broader objectives.

**Presenting Issue:** Sunday is overcrowded with activity and has a rushed pace.

**Strategic Goal:** Make the Sunday experience one that is more graceful, community-building, and renewing

Possible Responses	Related Assumptions
Improve Sunday worship – pay attention to rhythm, flow, the overall grace and beauty of the liturgy. Include training for altar servers; build competence for participation in the congregation.	Liturgy is mission—it is the central way in which we form Christians. Doing liturgy well requires careful attention and oversight. The congregation is not an audience.
Build understanding more generally in the parish about primary task – help parishioners identify their service as being primarily in daily life and help leaders and members understand ways in which the parish renews them spiritually. Work at identifying and correcting ways at which the parish’s institutional structures interfere with renewal.  Invite those with a calling to serve the parish to do so; give most others permission to do the minimum (attend worship, contribute financially, participate in significant community-wide decisions, such as the annual meeting).	The parish has important institutional needs but those cannot overwhelm or supplant the primary ministry of the baptized: being instruments of Christ’s love in the world. Leaders must meet the institutional needs of the parish and stack resources toward nurturance of the primary task.  Real “service” takes place in myriad ways. Service in the church is just one way, and most people won’t do it and shouldn’t. At the same time, we are each responsible for our own inclusion in the parish’s life and there are real expectations about what it means to belong.
Hold vestry and committee meetings on days other than Sunday.  Provide more in-depth adult formation opportunities at evening weekday sessions.	See above. Leaders must ensure that the parish can be a place of refreshment and renewal for most and a place of real calling for others. We accept our members where they are and we encourage them to go deeper by providing the space and time needed to explore spiritual life.
Improve coffee hour. Help the clergy focus on visitors. Provide space to connect with friends. Find ways for a few to pay consistent attention to newcomers without depriving most of their chance to maintain existing relationships. Serve good coffee. Provide time to get more detailed information about parish life.	Community life matters. We are a parish where we care about one another and have real connections. We welcome newcomers into our way of life, and we don’t exist to convince them to join us.
Help a critical mass of parishioners learn to say the Office most days.	The quality and flavor of the Eucharist will improve as more members steep themselves in the daily prayers of the Church. The climate of the parish will change as members learn about pattern, rule, and a mature, disciplined approach to faith.

Check these approaches against the intervention goals: they are focused on the long-term and important; they are focused on developing critical mass (*enough weight*, not purely numeric reckonings); on developing internal commitment; and they are supportive of an overall culture that values what is important. Getting concrete about what you’re trying to do and measuring it against established criteria provides a useful reality check.

Another example of strategic intervention could be where the rector notices that most people don’t know how to participate in the Eucharist. There is a tentative feeling, a lack of ownership, a passivity and lack of energy in the congregation. There is also concern about being welcoming to newcomers, who may not be familiar with the liturgy. A common response to this is to start giving a lot more instructions—telling people when to stand, what page to turn to, whether they are allowed to sit or whether they must kneel.

This has the actual effect of teaching the congregation to rely on instructions from the leader and to therefore become more and more dependent. It simultaneously prevents the Eucharistic community from experiencing the full power of the liturgy, precisely because it is conducted as if it's opening night but the cast don't know their lines and no one bothered to do any blocking.

This analogy becomes most apt when we realize that in comparing the Eucharist to a grand drama, the members of the congregation are indispensable cast members, not a passive audience there to be entertained.

A strategic approach is to set a goal of having more than 50% of the ASA know the liturgy so well they rarely need to look at the leaflet or Prayer Book. This requires scheduling regular times throughout the year where newcomers and longtime members who want to learn more are offered opportunities to gain additional understanding about the Eucharist and to develop new ways to participate and better own their experience.

It also requires welcoming newcomers to accept what is unfamiliar and to trust that the congregation will carry them in prayer. Of course, it's a lot easier to trust a congregation that clearly knows what it is doing. It may also necessitate some changes to the service leaflet so that you provide enough information that the person has options about their participation. If they then want to become part of the congregation, they will have opportunities to learn more.

This reciprocal and inter-dependent approach to inclusion, to belonging—here's what we know how to do; we will share it with you and be enriched by your contribution *and* you have to choose to partake—has a lot more impact on the parish's climate and on its ability to carry out the primary task than most other activities. Teaching people how to participate also takes only a few hours a year, but it is the rare parish that does it.

Another element of a strategic approach is to pay attention to the well-being of the whole and what the present symptoms might be telling us about the system overall. Using this same issue of not knowing how to participate in the Eucharist, it may be important to examine the parish's assumptions about adult participation in the life of the church and how take responsibility for our own spiritual lives. Does the parish accept passivity in other areas of its life? Does the rector experience concern or frustration about these tendencies but then act in ways that inadvertently reinforce them? Thinking carefully about the parish's challenges in light of the strategic objectives may allow other important considerations to emerge.

## ***Focusing on Strategic Issues***

### **The Demand System**

*Heavenly Father, in you we live and move and have our being: We humbly pray you so to guide and govern us by your Holy Spirit, that in all the cares and occupations of our life we may not forget you, but may remember that we are ever walking in your sight; through Jesus Christ our Lord. A Collect for Guidance, The Book of Common Prayer*

The prayer rightly assumes that we lose track of what's most important. We get caught up in all the “cares and occupations of our life.” We just do, and we will.

In organization development there's an assumption that all organizations have a “demand system.” That demand system is the web of expectations and pressures calling for energy, time and money. The demands may be external or internal. All parishes have the regular flow of work it must attend to. There's the occasional crisis, problems to solve and deadlines to meet. We also get caught up in work that just isn't very

important to what we exist to do and be. Some meetings, phone calls and e-mail are like that. Most of us also have routines that are in fact either busy-work or time wasters. All those things, the important and the unimportant, consume most parishes and most of our individual lives.

The activities that transform parish and personal life can take a back seat to the routine business that must be done and to the unimportant interruptions and trivia of life. What renews life and develops the parish waits for when there's time. This means relationships don't get built, people don't receive training and coaching in spiritual practices, strategic issues aren't addressed, and so opportunities are missed and crises not foreseen and prevented. These transformational activities, specifically because they aren't front-and-center in most people's expectations, and specifically because no immediate disaster will take place if they aren't attended to, generally do not form part of the existing demand systems of most parish churches.

We can turn all that around by consciously adding elements to the demand system. We need to add activities and resources into parish life—literally put them on the calendar—that keep the important, transformative matters in front of us. In congregational development it means things like a yearly leadership retreat that works only on strategic matters; having a skilled external consultant; leaders receiving in-depth leadership training for congregational development, and developing a richer parish life of prayer through the Daily Office, and increasing the ability of members for participation in the Eucharist and their own personal devotions.

In relationship to spiritual practices it may mean taking actions such as:

- Scheduling Evening Prayer Monday through Friday and recruiting teams of two or more people to cover each evening.
- Parish clergy changing their schedule so they can be at Evening Prayer most days.
- Creating and scheduling a Foundations Course, with at least three units of three sessions each per year. Scheduling several Eucharistic Practices sessions every year.

As Stephen Covey said, “The key is not to prioritize what's on your schedule, but to schedule your priorities.”

### **The case of Trinity Parish**

Trinity Parish is trying to maintain and improve a healthy life while also dealing with major transitions related to its property and a need to increase membership. This parish may face more than the usual dangers around the demand system issue.

Left to its own devices, Trinity is like most parishes. They enjoy their life together, people are supported and nurtured, and people grow in Christ—all the good things we hope for in a parish church. The difficulty is that in addition to those things, Trinity needs to put a lot of time and energy into intentional development around health and growth. To do that requires a context of accountability and support, including a system of mutual accountability and expectations with the diocese. Some of those issues are outlined below.

## *There's a need for partnership with the diocese*

Partnerships between parish and diocese can be simultaneously supportive and frustrating. Will Schutz, who worked with organizations such as NASA, AT&T and the World Bank, maintained that all group relationships need to attend to three recurring phases:

### **Inclusion**

Accepting the need for all parties being at the table, that each brings something necessary. From the diocese: an acceptance of the validity and need for this parish and this initiative. From the parish: a need for the perspective and resources of the diocese.

### **Control**

The need for both parish and diocese to have appropriate influence in the relationship. From the parish: a sense that they are maintaining control over their own future, that they aren't being micro-managed from "above." From the diocese: a sense that they are able to have enough influence to be responsible stewards of the diocese's resources and reputation.

### **Openness**

The need for a direct, timely, respectful, and thorough exchange of feelings and thoughts.

Both parties have some common needs, including that they end up with a parish large enough to be financially self-sustaining in a reasonable period of time. To do this requires, (1) that the initial decisions be set up to maximize the likelihood of adequate growth; and, (2) that the parish and the diocese create an ongoing mutual accountability in their efforts to get to a size that is self-sustaining.

## *There's a need for the parish to live within a context of health & growth*

This is about creating a context that keeps drawing Trinity back to the issues of health, viability and growth. Leaders need to identify the resources available locally and nationally to help establish such a context. Many dioceses have consultants available. It's worth getting information on the training and experience of the consultant before agreeing to a contract. Some dioceses have a program in congregational development, such as Shaping the Parish or CDI.

We can be unmindful of the web of expectations, pressures, and beliefs that inhibit our ability to do what's necessary for a healthier parish. We get driven along through the weeks and years by the routine demands of parish life. We assume there will be a time when we have the time to work on all the strategic and truly important developmental possibilities. It's a never-to-arrive time in the future. Developmental work occurs when we make it part of our demand system by creating a parish development team, using a skilled external consultant, having a yearly leadership retreat that is only about strategic and developmental concerns, and attending a program like Shaping the Parish or CDI.

For a parish, or any organization, to develop, it needs to give attention to strategic issues, including building its capacity through the development of its members and staff, capital improvements, and attending to long-range or systemic concerns. The chart below draws on the thinking of Stephen Covey. In organization development terms, it explores the way the demand system works.

What the chart shows is how some things have urgency because the system is arranged in a manner that draws our attention. The parish has certain routine activities and existing groups that "demand" our energy and time. Because we expect coffee hour on Sunday some members do the shopping and setting up. Many participate because it's there to participate in. Because there is a Finance Committee meeting every third

Wednesday people commit the evening and some do the needed advance work. Because June is agitated about the selection of hymns, two members listen to her for 20 minutes after Mass. The parish’s routine business, and even the interruptions, have a built in urgency that call on us to pay attention to them.

Other things can wait. They don’t press themselves upon us. They are not urgent matters; even if they are important; even if we acknowledge their importance when asked. Few people notice if we don’t do them. Creating and conducting an adult formation program, increasing Eucharistic competence, coaching people in prayer life, may all be seen as worthy activities. But if they aren’t done few object.

In understanding how this works we can confuse ourselves by using the word “should.” As in, “people ‘should’ feel an urgency about developmental matters.” Maybe we “should” but we rarely do. Developmental work is just not experienced as pressing.

	<i>URGENT</i>	<i>NOT URGENT</i>
<i>IMPORTANT</i>	<p><b>I. Normal Parish Business</b></p> <ul style="list-style-type: none"> <li>• The regular flow of work that the parish exists to do and does in support of that (such as the Eucharist and the choir rehearsal)</li> <li>• Crises</li> <li>• Pressing problems</li> </ul>	<p><b>II. Parish Development</b></p> <ul style="list-style-type: none"> <li>• Building parish capacity for health and the primary task</li> <li>• People development, an increase in competence for managing their spiritual life or doing the institutional work of the parish</li> <li>• Relationship building and trust development</li> <li>• Establishing a direction to move in (planning, visioning, identifying the three things that would most improve parish life)</li> <li>• Engaging new opportunities</li> </ul>
<i>NOT IMPORTANT</i>	<p><b>III. Interruptions</b></p> <ul style="list-style-type: none"> <li>• Some mail, phone, meetings, reports.</li> <li>• Other people’s inconsequential issues.</li> </ul>	<p><b>IV. Trivia</b></p> <ul style="list-style-type: none"> <li>• Busy work</li> <li>• Some mail, phone calls, meetings</li> <li>• Time wasters</li> </ul>



**How to Improve the Parish’s Health – Covey Model:**

	<i>URGENT</i>	<i>NOT URGENT</i>
<i>IMPORTANT</i>	<b>I. Normal Parish Business</b>  <b>MANAGE</b>	<b>II. Parish Development</b>  <b>FOCUS ON</b>
<i>NOT IMPORTANT</i>	<b>III. Interruptions</b>  <b>AVOID</b>	<b>IV. Trivia</b>  <b>AVOID</b>

**Ways to Focus the Parish on Strategic Issues**

Manage the parish’s routine life and business in a competent, thorough and efficient manner. Take care of what must be taken care of and do that well.

In order to get at the developmental issues work at establishing structures and processes (i.e., organizational behaviors) that focus on quadrant II. Examples include:

- A yearly leadership retreat focused on strategic issues, with at least the vestry and rector and perhaps with other key leaders.
- Use of a congregational development consultant.
- Placing on the parish schedule things like: Adult Foundation Courses sessions in the winter, spring and fall, annual quite days and spiritual retreats,
- Establishing a pattern of only dealing with strategic matters during every other vestry meeting or creating a strategic management group to focus on those matters while the vestry attends to more routine issues related to property and finances.
- Form and train a parish development team. If your diocese has a Shaping the Parish program or a CDI use the program to support and equip the team.

What you’re doing when you do these things is creating a new “demand system.” A yearly leadership retreat will usually generate energy among those attending. People will want to follow through on the ideas and decisions of the retreat. Things will be accomplished in the following months. And after several months the momentum created by the retreat will lessen. But for a few months it will have served as a demand system for important issues.

Giving adequate time to strategic issues is likely to result in an organization that has a sense of vision, balance, discipline, and fewer crises. Again, one of Covey’s central propositions is that a key is learning to schedule your priorities rather than trying to prioritize your schedule. Organizational leaders need to strive for about 25% of their working time in Quadrant II.

## ***Processes and structures to help a parish stay focused on developmental and strategic issues***

- Have the person with passion about an issue take the lead. This assumes that the person is willing to work within a process of listening to the larger community and be responsive to the priest's views on priorities and action.
- Recognize that nothing will happen if the rector (vicar, priest in charge) isn't committed to it. This is a simple reality of organizational life.
- Working Groups. Create groups based on the energy of the moment. Assume two to four months of work before the energy fades. Create objectives for the group that can be accomplished in that time frame. Assume work will get done in spurts of energy.
- Leadership Conference/Retreat. A weekend with two other parishes around a specific issue they have in common. Time at the conference will shift between all of the parishes simultaneously receiving some training or instructions from the consultants, to each parish doing its own work with the consultant moving among the parishes. Possibly have follow up check-in meetings a few times over the next year, something that specifically creates an external demand system to support strategic initiatives. Assume a second conference/retreat the following year. Consider opening the retreat to others in the parish beyond the vestry, especially to people who might follow through on the work. The agreement needs to be: Come to the retreat if you will fully participate and be willing to do follow up work for the next two to four months.
- Structure the vestry's time use. Try doing every other meeting on only developmental and strategic issues (no routine reports or business), OR use the first half of all meetings for developmental work. Don't meet every month. Don't have a vestry meeting in the same month the vestry has a leadership conference.
- Have focused times of check-in, input and testing with the whole congregation. Don't do so much of this that there's little time for getting work done.
- Use the consultant's time. The consultant's presence can help draw attention to the strategic issues. There may also be a value in having the consultant focus on any special areas of expertise he or she brings.

## ***Strategic Management***

In strategic management leaders establish the parish's direction, navigate toward the direction and shape the organization's culture and resources to advance those ends. It's like jazz: improvising on a theme.

Probably the biggest mistake made in this area is when a parish concentrates on strategic planning. Developing a document is the usual outcome. It may help to change the language. Instead of saying "We are developing a strategic plan," say, "We are focusing on strategic management." That can be done in many ways—we may identify three long-term goals to improve parish health and effectiveness (and three things to do this year that will move us in that direction), we may develop a strategic plan, or we may do something else.

A related mistake is when a parish develops a "strategic plan" that is in fact a laundry list of wishes. It's all the various projects people in the parish think should be done. Dollar figures may or may not be attached. Such documents often offer no sense of what on the list has priority. Overall, such documents simply aren't remotely strategic. In fact, in many cases they avoid the real strategic issues the parish faces by producing projects that keep people busy. The busyness distracts our attention from the fact we aren't really addressing our opportunities, building upon our gifts and strengths, dealing with what's out-of-whack, or engaging trends that threaten our survival, mission or primary task.

## Getting the Parish Focused on Strategic Matters

The overall task is to get the parish to pay attention to and act on opportunities for its own long-range development or transformation, the building of its capacity, and the prevention of crisis.

1. Focus on the *primary task* and core processes of the organization. Forming people in Christ so they may seek and serve Christ in the world is the task.
2. Attend to the *external forces* that offer new opportunities, place constraints on the parish and threaten its survival or capacity to advance its purpose.
3. Be clear about where the parish is in its *life cycle* and take action for its development appropriate to its life-stage.

## Methods in Strategic Management

1. Create the space and time and pressure to attend to strategic matters

This involves setting aside or containing the immediate “crisis,” the pressing project, interruptions, and all the business generated in the day-to-day operations of any organization. The “demand system” that is created by the endless flow of expectations, pressures and requests needs to be re arranged to create a new “demand system” that helps the organization focus on strategic matters. Establish structures and activities in the organization’s life that are given over to strategic matters. Possibilities include:

- a. Setting aside the first half of every staff and vestry meeting to work on strategic issues. Or give every other meeting entirely over to strategic issues; no financial or property reports at all.
- b. Have a yearly strategy retreat (a leadership conference/retreat). Use the time to build the leadership team and work on other strategic matters.
- c. Schedule a series of special meetings to work on one strategic issue. Cancel a few regularly scheduled meetings.
- d. Use an organization development consultant.

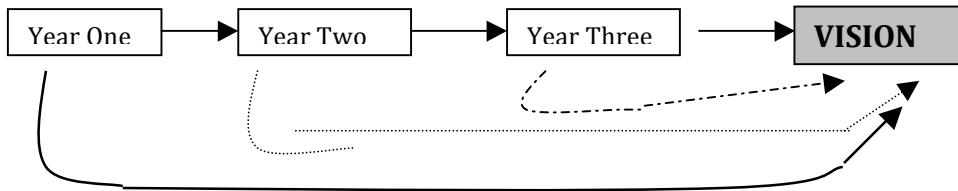
2. Use a Value-Centered Management Approach

A value-centered approach can help the organization establish a stronger sense of identity and purpose. The approach provides another guiding mechanism that can keep people focused on essential issues.

3. Use Some Method to Establish a Strategic Direction

## An Unfolding Vision Process

This involves creating a vision for how the parish might act and be in the future (3-5 years.) Notes may be made on people’s ideas for what may need to happen in future years. That may influence both the vision statement and this year’s plan. Then each year a short action-plan is created to move toward the vision during the coming year. The parish also “checks in” on the existing vision. Revisions are made as needed.



1. Create the vision  
2. Action plan for Year 1 to move toward the vision

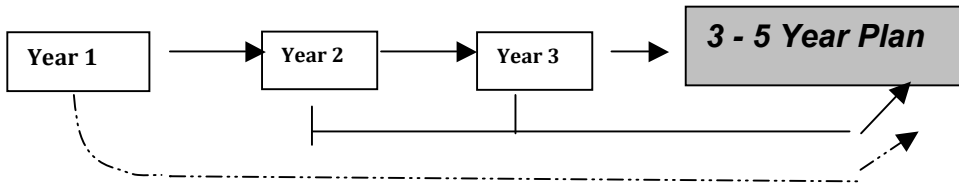
Action Plan for this year

1. Check in on vision – still “owned”?  
2. Action plan for year 3

The unfolding vision process allows for flexibility while maintaining a sense of direction. It may make some people anxious not to have each year “pinned down.” It does tend to keep the focus on where you want to go rather than on particular steps.

### Linear Planning

This involves both creating a statement of targets (i.e., results, outcomes, vision) that the organization wants to meet in three to five years and developing a plan for what will be done each year to move in that direction.



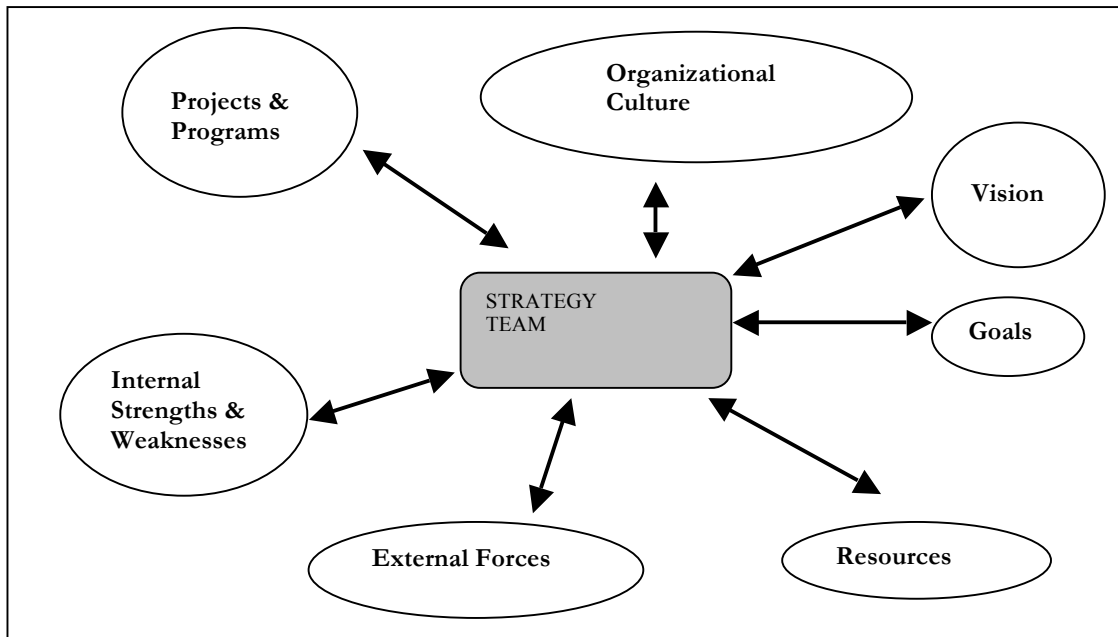
1. Establish Desired Long Term Results. What you want in 3 - 5 Years  
2. Plan out the goals and objectives for each of the 3 - 5 years

Each year – revise as needed

Linear planning provides a high degree of control and detail. If well done, it can provide for needed flexibility. However, it seems to have a tendency to give a “set in stone” tone to the process, even when we add disclaimers to the document. Attempts to revise yearly plans are often seen as signs of failure. It is a comprehensive and systematic approach but tends to be slow and therefore frustrating. The detail of it, touching every aspect of organizational life, can set off strong and broad resistance.

## Organic Planning

Some would say that this method isn't even planning. There may not ever be a written plan. The parish arranges itself to have a well-trained, disciplined strategy team. The team has the job of paying attention to all significant elements of the system and to help bring each into a process of mutual adjustment with the others. The effort is driven by an ongoing process of gathering and reflecting on information from each area.



Organic planning requires well trained, disciplined people who can quickly analyze information and take action. This may best be used in parishes working in a rapidly changing environment, facing immediate opportunities, or dealing with a crisis. This approach may encourage the continuing involvement of members and staff while allowing for timely action. Its comprehensiveness will depend on the skill and orientation of the strategy team.

### *The Rector's Role in Strategic Management*

1. Define the vision. The rector needs to have very high ownership of the vision if the organization is to make progress. It is usually important for the rector to play a central role in drafting the document, whether three statements of direction or five pages of a vision.
2. Keep the vision, primary task, values, etc., in front of the parish. The rector, along with other leaders, need to find a variety of ways to keep these guiding mechanisms before individuals and teams as they do their work. The clearer they are in people's minds, the more individuals and teams can be self-directed. The desire here is to guide the use of resources (human, financial, material) by the parish's stated strategic direction.
3. Maintain the system for strategic management; make sure that there is the space and time for it.
4. Structure ways in which the system and subsystems can "listen" to the organizational environment. Vary how it is done from time to time. For example,
  - By environmental segments (members, the unchurched, local communities, the national church or diocese, identified economic, population, or other demographic factors)

- By assessing the demand system. This would include both the internal and external demand system. Map out the groups, individuals, organizations that want, expect or demand something of the parish. Map out the current picture. Note the systems involved and what they are seeking. Map out the current response system. Then map out the demand system you would like to see in three to five years.
- By factors that influence the parish

<p><b>WIDER CONTEXT</b> Global and national, social, cultural, economic trends and forces that are impacting the parish</p>	<p><b>LOCAL CONTEXT</b> Regional, neighborhood, social, cultural and economic trends and forces that are impacting the parish</p>
<p><b>WIDER INSTITUTIONAL</b> The policies, reputation, use of resources of the larger institution you are part of (in this case it would be the diocese, the national church)</p>	<p><b>LOCAL INSTITUTIONAL</b> This is the parish itself - dynamics, culture, strengths, values.</p>

5. Take action to mobilize resources around strategic goals. Leaders need to facilitate, guide and insist that the parish “stack resources” around strategic matters.
6. Resource yourself as a leader. Arrange your own life in a way that enables you to use your strengths, develop new competence, keep perspective and stay centered. Advance training and case studies with other leaders is usually a help. Try regular coaching sessions with an organization development consultant to look at system issues. Use a therapist to discover and manage how your own family dynamics may be influencing your work. Seek spiritual guidance to stay in touch with your own best self, your own integrity.
7. Work with a strategy team. Bring together a team that will be your partners in strategic management. People who can think and act strategically, be collaborative with you and each other, and are committed to the organization’s vision.

### Areas in Which Strategic Management Is Used

1. Total Parish. Regarding the whole system, its mission, values, vision, new initiatives, etc.
2. Project or Program. A particular work of the parish. Assessing its “fit” with the larger parish’s values, vision, and culture; whether there are other organizations that do it better; the cost (high-low); and whether it is at the heart of the organization’s self-image (because of history or values in the organization, its integrity.)
3. Resource Support. Arranging for the resources needed for the whole parish or a program to function well.
4. Institutional Structures, Processes, Systems. Developing the parish so it has the ability to carry out strategic initiatives. This ranges from increasing the skills of working groups for decision making and problem solving to retaining key staff, to providing needed technology.

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<sup>i</sup> *Christianity for the Rest of Us*, Harper One, 2006