

United Church of Chapel Hill

2019 Strategic Planning Process

Strategic Planning: How we get from the known present to the hoped-for future.

The known present:

1. Previous studies
2. Environmental Scan
3. Analysis of the Scan (SWOT analysis)
4. The Time Line
5. The Storybook Project

The Hoped for Future:

1. The preliminary findings of the Faithful Futures study
2. Input from the January retreat
3. The Vision Workshop
4. Cameron's Vision for the next 5 Years

Process for getting there:

A. Preparation and onboarding of the new church Council: (late August)

1. Reading and discussion of all the materials generated so far
 - a) Review and discussion of Environmental Scan
 - b) The Storybook
 - c) Review and updating the Mission Statement
 - d) Review of the Core Values
 - e) Review of Cameron's Vision Statement
2. Adoption of these statements pending congregational final approval

B. Communications with the congregation and invitation for feedback

C. Congregational approval of Mission, Values, and Vision statements

D. Planning Process for Council

GOALS

1. Draft of 4-5 GOALS

Goals are general statements about what would be true (or what conditions would be present) if the 5-year Vision was accomplished.

2. Feedback on draft Goals from congregation
3. Revision and adoption of Goals by Council

OBJECTIVES

1. Draft 3-5 OBJECTIVES for each GOAL. **Objectives are the first step in translating the general goals into concrete and measurable actions.** They answer the question of how the goals are to be accomplished. But they are more than activities: They are "SMART" – specific, measurable, action-oriented and timely. As a result, they can be validated and progress tracked.

2. Feedback on Objectives from the congregation

3. Revision and adoption of the Objectives by Council

E. Strategies and tactics

STRATEGIES

1. For each objective there are approximately 3-4 specific and measurable activities undertaken to accomplish that objective. Strategies answer the questions: What? How? Who? When? They may also change if the environment changes.

A critical transition takes place here, in that strategies are the responsibility of staff. They may solicit and receive creative input from the congregation (individuals and boards), but ultimately the strategies are the responsibility of the clergy and other senior staff members. The staff (not lay people) will be held accountable for the accomplishment of the strategies so it is imperative that they oversee and approve of the design of the strategies. This step will also involve a feedback mechanism.

TACTICS

1. Tactics are the short-term individual activities that staff and lay leaders undertake to accomplish each strategy. There may be dozens of tactics – some lasting one hour or one day, others lasting months. Some may be policy changes, others events or programs. These activities are the place where lay members of the church are most involved in creating and executing ideas. They are not part of the SP process at this time.

F. Finance and sequencing

Once the Goals, Objectives and Strategies are in place the staff will need to examine three key issues: What all this will cost, in what order will things be done, and which staff member will be ultimately responsible for the accomplishment of these things? These realities may force some readjustment in the larger plan, especially at the objective and strategy level.

Questions that may arise:

- a. Where will the money come from?*
- b. Do we need more staff or should job descriptions change?*
- c. Contingencies: Are there some things that have to happen for others to follow?*
- d. Will we have to stop doing some things we are doing now in order to make room/time for the new activities?*

G. Adoption of draft plan, interpretation and communication

Once the Council has reviewed and discussed the full plan it will vote to adopt the draft. Upon adoption members of the Council will participate in a communications rollout of the plan with each of their constituent groups (including the “At Large” members). It will also be posted for all members of the congregation to see and discuss in advance of an all-church meeting.

H. All-church meeting to discuss and adopt the plan.

This is an up or down vote. Sections should not be rewritten in the meeting. If it is adopted, it immediately goes into effect (or a fixed date if that option is chosen). If it is rejected, it goes back to the Council for revision.