

Planning: Six Assumptions, Six Realities

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As a congregational leader—a pastor, a rabbi, or a congregational member who holds a formal or informal position of leadership—you have to think about planning. Planning is *de rigueur*, a nearly obligatory responsibility of leaders across all faith and denominational boundaries. You must help the congregation to understand where it is going, why such a direction is important and how to get there. You need to have a plan to structure work and maximize the resources of the congregation, and to build agreement so that people are willing to move together toward a shared goal.

You know the basics of planning—like how important it is to map out your route, to create a representative process or to include time for biblical study and discernment.

What are some of the pitfalls and snares to avoid? What are the assumptions and presumptions that can bog down your process?

1. **Assumption: A good planning process will be structured around current research, best practices and leading edge thinking.** Students and scholars of management and leadership are continually examining the field of planning to improve its theories, programs and practices. The top business articles and management journals can inform you on the latest thinking and data analysis to apply in your congregation.

Reality: While the newest thinking on planning is energizing to consider, your process must be appropriate to the needs, abilities and situation of your congregation. If the goal of the church is membership growth, the process must look at membership and attendance data. If the purpose is outreach and evangelism, the process must look at community demographics.

2. **Assumption: A good planning process will find a solution that satisfies the various interests in the congregation and, at the same time, meets the congregation's spiritual and organizational needs.** The process will result in consensus that represents the greatest portion of the congregation, resolves competing differences and allows the congregation to move ahead.

Reality: A good planning process will result in clarity of purpose that compels the congregation to move ahead, but might not give everyone what he or she wants. And that's a good thing. An easy consensus may mean that the congregation has limited itself to the lowest common denominator, an idea or plan that almost everyone can agree on. A meaningful plan will address issues that are central to the identity and purpose of the congregation, and allows it to consider a call that surpasses different preferences and opinions.

3. **Assumption: Disagreements and competing preferences mean that the planning process is failing, and leaders should intervene to keep the process on track.** A planning process is the way to negotiate different opinions and get a consensus on goals. A skilled leader will steer the group away from landmines and heated arguments to achieve consensus.

Reality: Planning gives people a safe and structured place to explore what is important to them and their vision for their congregation. Congregations come to agreements on the future through disagreements, such as how they will pass on their faith traditions to the next generations. People argue about what they believe is most important, then they accommodate by finally making decisions about their shared future. A leader's role is to provide the structure and safety necessary for people to have the conversations and disagreements they need to discern their future with God.

4. **Assumption: Congregations that are committed to good planning will make the time to do it right.**

Reality: There is a limit to the people and energy available to devote to planning, in any organization—not just congregations. Leaders must honour this limit on resources and ask what part of planning is needed most right now—is it learning about new ideas, dreaming and shaping a vision, reviewing data to be realistic about current situation, or shaping specific programs and goals? When the planning task is too large, beyond the realities of ability or available resources, leaders must work on the steps the congregation is ready to take, steps that will lead it toward the goal. Like the headlights on a car at night—they won't light the whole journey, but they show you the next part of the road.

Few congregations need—and are capable of—an extended and exhaustive planning process. Congregations do, however, need to structure ways to talk about their identity, purpose, and future, and they need a path to develop their commitments to act together.

5. **Assumption: A planning process must result in a written plan that will serve as a reference and a guide for the actions steps into the future.** The written plan is what effects change, creates an accountability structure, and moves a congregation into the future.

Reality: A planning process provides direction and structure for conversation. The product of a planning process is not necessarily a written plan. The important product of a planning process is a conversation that changes a congregation, whether it results in a written document or a less formal set of agreements. The planning process is a way to provide the direction and the structure necessary for the conversation. A plan is much more than an answer to a question—it is a tool for people to have a necessary conversation about what is important.

It's not the plan, it's the conversation—with one another and with God. It's not the graph of attendance figures for the past 15 years that will tell you what to do. It's *the conversation* about that graph and those numbers, when people wrestle with the tension between their intent and their reality (the graph), that will provide direction and meaning.

6. **Assumption: You need to set a timetable and stick with it.** A planning timetable lets you integrate a predetermined planning program into your congregational year, and mesh planning with other important themes on the calendar, such as stewardship.

Reality: Focusing on a preset program can limit the congregation's opportunity to use space and time for the intrusion of the hand of God or the movement of the Spirit that might operate on a different timetable.

One of the intriguing stories in Hebrew scripture refers to "pitching tent" in the book of Exodus. When the Israelites wandered in the desert, they moved when the pillars of cloud and fire moved—that is, when they had a clear sense of direction. When they were not sure about their next step, they "pitched tent" and waited to discern the next steps of their journey. This suggests that discernment does not operate on a knowable timetable. Instead, the plan and the path were developed within a discerning relationship with God. They were not able to rush ahead directly to the Promised Land. Had Moses been a better planner, and discovered a direct route to make the trip to the Promised Land in a matter of months instead of wandering for years in the desert, the people may not have changed when they arrived. They may have arrived much the same as when they left Egypt. It was the journey that was important, when they had to ask questions of how they would form community and what was important about their relationship to God that shaped them as a nation.

So, allow planning to take the needed amount of time, despite the reality that there will be those in the congregation—including yourself—who will be anxious to get to the "answer" and know what to "do."

Based on excerpts from the book, Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations, by Gilbert R. Rendle and Alice Mann Herndon, VA: The Alban Institute, 2003