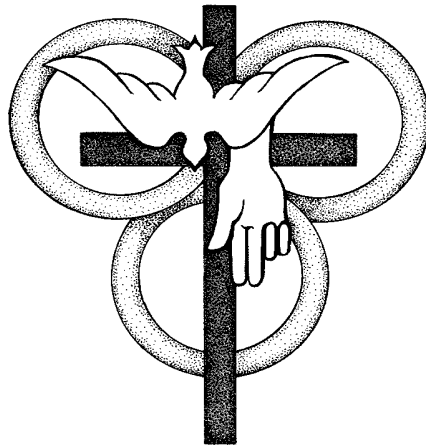

TRINITY LUTHERAN CHURCH

STRATEGIC PLAN

2002



PREPARED BY

HUMAN TECHNOLOGIES INTERNATIONAL

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TRINITY LUTHERAN CHURCH

THE PLANNING PROCESS

On September 29, 2001, Ray Rood, President and Senior Consultant of Human Technologies International, facilitated a day-long *Strategic Futuring Workshop (Vision Day)* where stakeholders reviewed Trinity Lutheran Church's purpose, mission, history and emerging community related trends. The participants then envisioned Trinity Lutheran Church in the year 2011 and determined vision-based, strategic goal candidates. The day concluded with developing candidate vision statements.

Following the *Vision Day* five goal groups were then formed, each to develop plans around a specific goal area. A vision-based strategic plan was developed for TLC, including twelve-month tactical objectives and activities necessary to support progress toward the 2011 Vision.

PURPOSE STATEMENT

A Community Growing Disciples for Christ

MISSION STATEMENT

- *Trinity is a church of word and sacrament committed to inspire people of all ages to grow in their understanding of Jesus Christ and to live out His invitation to follow Him.*
- *Trinity is committed to continue faith education for all with an emphasis toward working with youth and their faith development.*
- *We strive to grow a family of disciples in Christ, sharing and living the Good News.*

VISION STATEMENT

We see Trinity Lutheran Church as a Christ-centered, dynamic environment that nurtures the spiritual, physical and emotional needs of its growing congregation and the surrounding community.

STRATEGIC GOALS

The following goals frame Trinity Lutheran Church's strategic focus over the next two to five years, in order to move towards its vision, while carrying out its mission and purpose. These goals set the direction for the Strategic Plan.

Goal 1: Mission/Vision

To build and nurture a culture of Christ-centered disciples.

Goal 2: Staffing

To put a system in place to identify and implement paid and volunteer staffing needs.

Goal 3: Facilities

To explore, and subsequently to create, a facilities plan that is fiscally feasible to meet the needs of Trinity's congregation and regional community, today and in the future.

Goal 4: Funding

To create a comprehensive, coordinated, spirit-driven capital funding plan that will meet present/future funding needs and that all people of Trinity can become passionate about supporting personally.

Goal 5: Communications

To clarify and enhance a communication process and plan.

2001 TACTICAL PLAN

(Phase I of the Strategic Plan)

The following objectives, activities and timelines are based upon the input of the specific strategic goal groups. They serve as the foundation for the strategic plan, a living document that will be regularly reviewed and updated. (Dates in parentheses indicate target dates for completion of specific activities.)

Goal 1.0: Mission & Vision

➤ **To build and nurture a culture of Christ-centered disciples.**

Objective 1.1: Identify the marks of a Disciple.

Activity 1.11: Develop a working definition of "Disciple."

A disciple is a follower of Jesus Christ.

Jesus taught us to:

- PRAY daily
- WORSHIP weekly
- READ scripture
- SERVE others
- Enrich RELATIONSHIPS
- GIVE of my time, talents and resources.

Therefore, the 6 Marks of a Disciple are defined as, but not limited to those above. (*✓November 15, 2001*)

1.12: Church Council will appoint a discipleship task force to fine tune the discipleship definition and carry out subsequent objectives.
(*May 1, 2002*)

Responsible Parties: Mission/Vision Goal Group Co-Chairs Kristen Numedahl and Judy Qualley

Objective 1.2: Offer discipleship education.

Activity 1.21: Group identified in 1.12 will assist staff in identifying tools appropriate for training and education of the congregation.
(*July 11, 2002*)

1.22: The identified group will take the leadership in developing and implementing a plan for incorporating a discipleship culture into all commissions for modeling, ownership, and encouragement.

(Identified focus groups: adult education, spiritual renewal, retreats, Sunday school, new members, inactive members, and general community outreach) (*September 12, 2002*)

Responsible Parties: Discipleship Task Force

Goal 1.0: Mission & Vision(cont.)

Objective 1.3: Provide opportunities for action.

Activity 1.31: All of Trinity's leadership (defined: *taking the initiative and being willing to take the responsibility for the initiative*) will model and provide opportunities to grow as a disciple, focusing on the Six Marks of a Disciple (see 1.11). (*September 12, 2002 and Ongoing*)

Responsible Parties: Discipleship Task Force

Objective 1.4: Communicate with Church Council

Activity 1.41: Quarterly meetings of the task force leaders with Church Council.
(*Ongoing, beginning June 13, 2002*)

Responsible Parties: Church Council

Goal 2.0: Staffing

- **To put a system in place to identify, prioritize, and implement paid and volunteer staffing needs.**

Objective 2.1: Establish a task force to create a system to identify staffing needs and make appropriate recommendations.

Activity 2.11: Invite members of the congregation to place their names in consideration for the Personnel Needs Task Force.

2.12: The Church Council will consider the names brought forward and will select a multi-generational task force of 8-10 people to work closely with the Personnel Commission. *(May 1, 2002)*

Responsible Parties: Church Council

Objective 2.2: Design/development of the system.

Activity 2.21: The Staffing Task Force will research successful staffing systems at other churches, businesses, and non-profit organizations. *(August 8, 2002)*

2.22: The Staffing Task Force will put a broad outline together of what the system will include. *(September 12, 2002)*

2.23: The Staffing Task Force will also decide who will determine the staffing needs and what process will be involved in that determination. *(January 1, 2003)*

2.24: The Staffing Task Force will present the preliminary outline to the Church Council for review and evaluation. *(March 2003 Council meeting)*

2.25: The task force will draft the final proposal for Church Council approval. *(May 1, 2003)*

Responsible Parties: Personnel Needs Task Force

Objective 2.3: Communicate with Church Council

Activity 2.31: Quarterly meetings of the task force leaders with Church Council. *(Ongoing, beginning June 13, 2002)*

Responsible Parties: Church Council

Goal Group Note: In assessing our challenge, we determined that it was not our job to select staffing needs or even determine if these exist. Rather, it was our charge to put a system in place to facilitate making those decisions and to meet those challenges when our final vision is set and Trinity Lutheran Church makes a congregational decision to move on that vision.

Goal 3.0: Facilities/Needs Assessment

- **To explore, and subsequently to create, a growth plan that is physically needed and financially feasible to meet the needs of our congregation and regional community, today and in the future.**

Objective 3.1: Establish a task force to make recommendations to the council to explore all facility options.

Activity 3.11: Invite members of the congregation to place their names in consideration for the Facilities/Needs Assessment Task Force.

3.12: Taking into consideration the findings/priorities of long-range planning and assessing, determine the scope and/or accountability and timelines of the task force. *(April 15, 2002)*

3.13: The Church Council will consider the names brought forward and will select a multi-generational task force of 8-10 people. *(May 1, 2002)*

Responsible Parties: Church Council

Objective 3.2: Design/development of the growth plan.

Activity 3.21: The task force shall form sub-committees as needed for gathering information and reporting back to the task force on --

- Immediate needs vs. long range
- Code and zoning requirements
- Growth pattern of community and church
- Technical need, now and in the future
- Current buildings and options
- Existent building options in the community
- On-site, off-site, or combination of both
- Expandability of each.
- Cost analysis
- Other

(June 13, 2002)

3.22: Develop plans or models of options and present recommendations and estimated costs to the Council. *(December 12, 2002)*

3.221: Options will be presented to congregation for feedback. *(March 13, 2003)*

3.23: Present final recommendation to the congregation. *(July 1, 2003)*

Responsible Parties: The Church Council

Objective 3.3: Communicate with Church Council

Activity 3.31: Quarterly meetings of the task force leaders with Church Council. *(Ongoing, beginning June 13, 2002)*

Responsible Parties: Church Council

Goal 4.0: Funding

- **To create a comprehensive, coordinated, spirit-driven capital funding plan that will meet present/future funding needs and that all people of Trinity can become passionate about supporting personally.**

Objective 4.1: Establish a task force to create a system to identify funding needs and make appropriate recommendations.

Activity 4.11: Invite members of the congregation to place their names in consideration.

4.12: The church council will consider the names brought forward and will select a multigenerational task force of 8-10 people. *(May 1, 2002)*

Responsible Parties: Church Council

Objective 4.2: Design/development of the system.

Activity 4.21: The funding task force will research successful funding systems and educational strategies at other churches, businesses, and non-profit organizations. For example, the following areas could be explored.

- Capital fund campaigns
- Endowment funds
- Grants
- Estate planning
- Tithing
- Fee for services
- Permanent capital fund budget line item
- Other

(August 8, 2002)

4.22: The funding task force will develop plans or optional models of the funding system and present recommendations and estimated costs to the church council. *(September 12, 2002)*

Responsible Parties: Funding Task Force

Objective 4.3: Communicate with Church Council.

Activity 4.31: Quarterly meetings of the task force leaders with Church Council. *(Ongoing, beginning June 13, 2002).*

Responsible Parties: Church Council

Goal 5.0: Communications

➤ **To clarify and enhance a communication process and plan.**

Objective 5.1: Establish Communication Task Force to create a draft communications plan.

Activity 5.11: Invite members of the congregation to place their names in consideration for the Communication Task Force.

5.12: The Church Council will consider the names brought forward and will select a multi-generational task force of 8-10 people.
(May 1, 2002)

Responsible Parties: Church Council

Objective 5.2: Identify opportunities for communication not currently utilized.

Activity 5.21: Survey and evaluate Trinity and other comparable organizations and churches with communication processes which are seen as being successful and effective. *(July 11, 2002)*

5.22: Deliver report/recommendations to Council. *(August 8, 2002)*

Responsible Parties: Communications Task Force

Objective 5.3: Develop a communication plan. *(September 12, 2002)*

Responsible Parties: Communication Task Force

Objective 5.4: Communicate with Church Council

Activity 5.41: Quarterly meetings of the task force leaders with Church Council.
(Ongoing, beginning June 13, 2002)

Responsible Parties: Church Council

CONSULTANT RECOMMENDATIONS

Strategic planning is a dynamic, on-going process --

- a process of envisioning the future and **engineering a way to get there**
- a process where the plan is **never perfect or complete**
- a process that is not an end in itself, but a **means to move towards identified goals**
- a process that is dependent upon **leaders who are able to mobilize and coordinate human efforts**
- a process that will need **support sufficient to sustain its ongoing development**

Therefore, HTI offers the following recommendations:

1. That a date one year from adoption of the plan, be set for all Strategic Plan Stakeholders to report on and celebrate the progress of the first year of the plan.
2. That HTI will support Trinity Lutheran Church through the first one-year cycle of implementation and planning through the facilitation of quarterly assessment meetings and phone consultation as needed. (It has been HTI's observation that it takes approximately three years for such a vision-based planning and implementation process to become integrated and to create its own momentum. Particularly during the first year, organizations benefit from an accountability mechanism from outside itself.)
3. That the Church Council determine a date following the evaluation and celebration for revisioning and recommencing the strategic planning process, in order that the next Tactical Plan will be ready for Implementation by June 2003 with a target completion date of December 31, 2004. This could then be the beginning of a regular eighteen month planning and implementation cycle.

HTI has enjoyed the opportunity to serve as a catalyst and support for the development of a strategic plan for Trinity Lutheran Church and looks forward to providing further support during these critical months of integration and implementation.

APPENDICES

FUNDING NEEDS ASSESSMENT GOAL GROUP

Issues, Problems and Questions:

Some of the common issues our group identified were:

- Lack of Understanding about
 1. Needs of the church both current and long range
 2. Personal accountability to the process
 3. How all members have ownership in the process
- How do we implement a plan and have everyone involved
- The size of our church allows anonymity
- There currently is not a capital fund plan or administrator
- Time and talents under-utilized
- How do we lift up lay ministries

COMMUNICATIONS Goal Group

Issues, Problems and Questions:

- Identify audience / groups
- Large number of people with whom to communicate (internal)
- Many age groups
- May need additional staff (could be volunteer)
- Unknown external audience
- Cost
- Need to be "intentional"
- Need to "keep it fresh"
- Identify tools and resources
- Evaluate current
- Must keep content sensitive
- Special interest / issues
- Make use of all media available
- Difficult to gather news / input
- Need "decision screen"
- Improve (speed, method) of meeting results or minutes
- Keep information concise
- Challenge to stay techno-current
- Target communication to specific interest groups
- What to communicate?

Primary focus areas:

- Content
- Audience
- Media
- Process

SAMPLE SURVEY

The purpose of this survey is to determine communication preferences, in an effort to develop a communication plan for Trinity Lutheran Church, Owatonna, MN as part of the Visioning process.

We define communication as "any exchange of information".

1) By what means do you prefer to communicate with Trinity, both giving and receiving information? (please check all that apply)

- | | |
|--|-------------------------------------|
| <input type="checkbox"/> Announcement during services | <input type="checkbox"/> Phone call |
| <input type="checkbox"/> Word-of-mouth | <input type="checkbox"/> Bulletin |
| <input type="checkbox"/> Messenger (newsletter) | <input type="checkbox"/> Post Card |
| <input type="checkbox"/> Separate mailing | <input type="checkbox"/> Posters |
| <input type="checkbox"/> Newspaper | <input type="checkbox"/> E-mail |
| <input type="checkbox"/> Other (Please describe) _____ | |

2) What types of information are of interest to you? (please check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Local mission | <input type="checkbox"/> Global mission |
| <input type="checkbox"/> Pastoral information | <input type="checkbox"/> Council information |
| <input type="checkbox"/> Commission information | <input type="checkbox"/> K-6 program |
| <input type="checkbox"/> Jr. High program | <input type="checkbox"/> Confirmation program |
| <input type="checkbox"/> High School program | <input type="checkbox"/> Adult Education programs |
| <input type="checkbox"/> Senior programs | <input type="checkbox"/> Family programs |
| <input type="checkbox"/> New member info | <input type="checkbox"/> Stewardship/Fundraising |
| <input type="checkbox"/> Property / Facilities | <input type="checkbox"/> Local partnerships |
| <input type="checkbox"/> Community involvement | <input type="checkbox"/> Volunteer opportunities |
| <input type="checkbox"/> Other (Please describe) _____ | |

3) If you have a concern (e.g., prayer request, opinion, feedback), how would you go about communicating it at present? _____

- | | | |
|--|-----|----|
| 4) Do you have access to a computer? | Yes | No |
| 5) Do you have e-mail? | Yes | No |
| 6) Do you have access to the Internet? | Yes | No |

7) Please provide any feedback or suggestions related to Trinity communication (things we already do well or things we could improve upon) _____

ACKNOWLEDGMENTS

Goal Group Participants

Mission/Vision

Kristen Numedahl *
Judy Qualley*
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Mark Gitch
Larry Keltto
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Pastor John Lestock
Steve Nelson
Sue Roverud
Eileen Sampson

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Kelly Reich*
Millie Krause
Steve Larsen
Don Petersburg
Jeff Valen
Pastor John Weisenburger

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Trudy Haugen*
Luci Christianson
Maren DeLaitsch
John Furē
Larry Iverson
Pam Larsen
Jennifer Petersburg
Lynn Reich
Jim Roverud
Bob Stark
Harold Willert

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Greg Krueger *
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John Petersburg
Vivian Peterson
Marlys Stark
Kathy Streiff
Steve Weigt

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Paul Harty
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Judith Peterson
Phyllis Reynolds
Dick Schuster
Lorie Thompson
Leona Willert

- Denotes committee chairperson