

<b>CHRIST'S CHURCH</b> OF THE VALLEY	Management System – Operating Procedure	
	OP5001 Strategic Planning	Revision: A
	Page 1 of 7	

## Approval

Originator	Reviewer	Approver
Kevin Stone	Brian Jones	Kevin Stone

## Revision History

Rev.	Date	Originator	Summary of Changes
A	9/30/09	Kevin Stone	Initial Release

### 1. Purpose

The purpose of this operating procedure is to establish, document, and communicate the process for strategic planning at Christ's Church of the Valley (CCV).

### 2. Scope

The strategic planning process is used by ministry staff to evaluate the organization's performance, in terms of meeting stakeholder needs, and to develop a plan to better meet those needs during the coming planning period. The process begins with an annual strategic planning session and ends with the distribution and periodic update of a strategic plan document as well as a set of assumptions and other input for the financial planning process.

### 3. Responsibility

As with all procedures and other documentation contained in the Management System, it is the responsibility of all ministry area leaders to ensure the details of this process are known and followed by all CCV paid staff and ministry area volunteers. The primary responsibility for this process rests with the Executive Pastor.

### 4. Definitions

**Stakeholder** – A stakeholder is any person or group of people having a concern with or who are affected by the performance of the organization. In the context of the church, Jesus is the chief stakeholder. Second to Jesus, the primary (most important) stakeholder is the target (the group of individuals the church is trying to reach). Other important stakeholders include the church staff, volunteers, members, and attendees.

**Strategy** – The strategy is the statement of how the church is going to meet the stakeholder needs. It is made up of a mission, vision, and set of core values.

**Core Values** – The list of core values are those key beliefs and/or statements of fundamental principles that are “non-negotiables” for the church.

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<b>CHRIST'S CHURCH</b> <small>OF THE VALLEY</small>	Management System – Operating Procedure	
	OP5001 Strategic Planning	Revision: A
	Page 2 of 7	

**Mission** – The mission is the statement of what the church is trying to accomplish. All Christian churches have basically the same mission as developed in the New Testament which is basically to “reach the lost.” It is, however, stated differently depending on the unique DNA and approach of the individual church.

**Vision** – The vision is the statement describing how the church is going to accomplish the mission.

**Systems, Processes, and Methods** – Systems, processes, and methods are the “nuts and bolts” of how the strategy is implemented. Every functional area of the church should be defined, formalized, and documented, making up the collection of systems, processes, and methods that implement the strategy.

**Results** – Results are formal measures (preferably graphical) covering every area of the organization, ensuring the effectiveness of every system, process, and method is being measured and evaluated on a regular frequency.

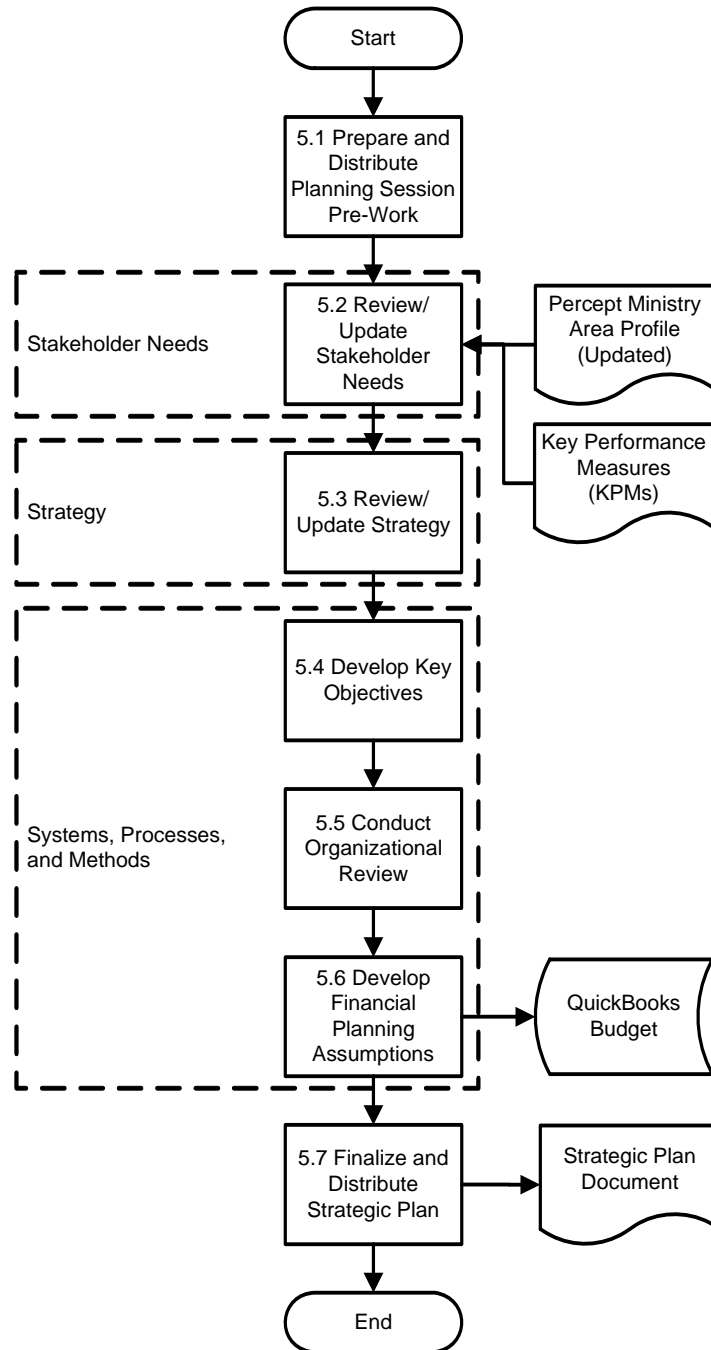
**Percept Ministry Area Profile** – The Percept Ministry Area Profile is a report of demographic details about the target group. CCV has defined the target as those living within a 20 mile radius of the campus.

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## 5. Procedure



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<b>CHRIST'S CHURCH</b> <small>OF THE VALLEY</small>	Management System – Operating Procedure	
	OP5001 Strategic Planning	Revision: A
	Page 4 of 7	

## **5.1 Prepare and distribute planning session pre-work.**

- 5.1.1 To begin the annual strategic planning process, the Executive Pastor schedules the time with the ministry staff. Time can be spent all at once in a multi-day offsite meeting or a day per week can be devoted for several weeks.
- 5.1.2 The planning session schedule should allow completion of this process and the financial planning process in time to gain leadership team approval by or before the 3<sup>rd</sup> week in November.
- 5.1.3 The ministry staff is provided with an updated Percept Ministry Area Profile and a questionnaire along with an agenda for the planning session(s) prior to the first meeting.
- 5.1.4 Each ministry staff member should meet with their team (staff and/or volunteer) in preparation for the planning session. These meetings should be focused on gaining input and insight from the team as to the results from the previous year and what needs to happen in that ministry in the coming year.
- 5.1.5 The result of these “pre-planning meetings” should be documented and brought to the first planning meeting.

## **5.2 Review/update stakeholder needs.**

- 5.2.1 The first step in developing the strategic plan for the coming year is an evaluation of the stakeholder and how well CCV has met their needs over the previous year.
- 5.2.2 The stakeholder needs evaluation is accomplished through a thorough review of the demographics to improve the team’s understanding of the target group and their needs.
- 5.2.3 The outcome of the stakeholder evaluation is documented via a target group (Perkiomen Pete and Paula) profile document. The document is updated each year as needed to keep it current.
- 5.2.4 Determining how well CCV has met the stakeholder needs is accomplished through a review of the “results” (KPMs) as well as other information the ministry staff may have (discussions with newcomers, experiences with volunteers, informal feedback, surveys, etc.).

## **5.3 Review/update strategy.**

- 5.3.1 The next step in the planning process is a review of the documented strategy.
- 5.3.2 Equipped with a renewed understanding of stakeholder needs, the ministry staff reviews all parts of the documented strategy to ensure its implementation will completely and effectively meet the needs of the stakeholders.

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<b>CHRIST'S CHURCH</b> <small>OF THE VALLEY</small>	Management System – Operating Procedure	
	OP5001 Strategic Planning	Revision: A
	Page 5 of 7	

- 5.3.3 If necessary, the strategy is revised to correct any concerns that its implementation will not completely meet stakeholder needs.
- 5.3.4 Any changes to the strategy are recorded and included in the final strategic plan document.

#### **5.4 Develop key objectives.**

- 5.4.1 The next step in the planning process is the creation of a master set of key objectives.
- 5.4.2 The key objectives state what the ministry staff determines are those specific actions needed, for the given planning period, to improve existing systems, processes, and methods or to create new systems, processes, and methods.
- 5.4.3 Key objectives are brainstormed during the planning session. Each key objective should be connected to a specific measure or measures and be clearly an action deemed necessary to improve the church's implementation of the strategy.
- 5.4.4 Each key objective is listed and an "objective leader" is assigned that is responsible for ensuring the objective is completed.
- 5.4.5 The objective leader, working with the rest of the ministry staff, commits to a due date for the objective, which is also documented.
- 5.4.6 The list of key objectives, along with leaders and due dates for each, is recorded in the final strategic plan document.

#### **5.5 Conduct organizational review.**

- 5.5.1 Once the plan is documented at least in draft form, the process of determining what resources will be necessary to ensure its successful accomplishment is initiated.
- 5.5.2 The first resource area to consider is the existing staff and volunteers. The organizational review is a formal review and discussion of how the church is currently organized and how, if needed, the organization should change/evolve over the coming planning period.
- 5.5.3 In addition to the organizational structure, the ministry staff discusses each member of the staff as well as key volunteer leaders, determining where weaknesses exist and how best to address these weaknesses.
- 5.5.4 A formal "faces to watch" list is developed and documented as a vehicle for discussing up and coming leadership talent in the church, being sure to identify staff positions or areas of service that could be filled with up and coming leaders.
- 5.5.5 An initial list of "new hires" is also developed and documented as part of the organizational review. The financial resources needed to add the people or positions on the list are determined as part of the financial planning process. Adjustments in the list are made if necessary which more often than not impacts the key objectives previously identified.

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5.5.6 The outcomes of the organizational review process include revised organizational charts as well as listings of both “faces to watch” and agreed upon new hires.

**5.6 Develop financial planning assumptions.**

5.6.1 From the draft of the strategic plan a set of assumptions is developed that will drive the financial planning process.

5.6.2 First, the plan drives the creation of an income model that helps the senior staff to project the income line of the budget.

5.6.3 Major events, conferences, etc. are listed in the assumptions along with timing and rough cost estimates.

5.6.4 The outcome of the organizational review in terms of planned staff additions is used to determine the salary and benefits budgets.

5.6.5 The cost to implement other key objectives is also included in the financial planning assumptions.

**5.7 Finalize and distribute strategic plan.**

5.7.1 After the strategic plan has been adjusted as a result of the financial planning process and other considerations, a final draft is distributed for the senior staff’s review.

5.7.2 Following the final review, a master copy of the strategic plan is published as a PDF via the Intranet. CCV staff is notified and encouraged to review and get familiar with the completed plan.

5.7.3 The completed plan is formally presented to CCV staff during a monthly communication meeting.

5.7.4 The strategic plan is reviewed by the senior staff and adjusted as needed on a monthly basis.

**6. Related Documents**

**6.1 OP5001-F001 Strategic Plan**

**6.2 OP5001-F002 Planning Calendar Worksheet**

**6.3 PL5003 Position Paper – The Performance Cycle**

**6.4 PL5004 Position Paper – The Management System**

**7. Records**

Record Identification	Record Owner	Location	Record Media	Retention/Disposition
Strategic Plan Document	Executive Pastor	Sharepoint	Electronic	Indefinite via Backups

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<b>CHRIST'S CHURCH</b> OF THE VALLEY	Management System – Operating Procedure	
	OP5001 Strategic Planning	Revision: A
	Page 7 of 7	

## 8. Process Effectiveness Metrics

Metric	Tool/Analysis Method(s)	Reporting	Frequency
CCV Key Performance Measures	Fellowship One, QuickBooks, CCV Stat Sheet	PowerPoint Graphs	Monthly

## 9. Miscellaneous

None identified.

## 10. Attachments

None identified.

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