

Workshops for Christian Ministry



- **Visioning and Planning**
- **Governance**
- **Fundraising and Planned Giving**



Christian ministry requires thoughtful and faithful planning.

We may find ourselves doing planning because our resources are limited or because funders demand it, but the real motivation for thoughtful and faithful planning is that we sincerely want vibrant and flourishing Christian ministry.

In December, 2008, 35 members of specialized ministries in The Presbyterian Church in Canada gathered for a four-day conference at Crieff Hills Community, in Ontario. This booklet is a distillation of that time they spent with their leaders.

Workshop 1: Visioning and strategic planning

The Bible says, “Where there is no vision, the people perish” (Proverbs 29:18, KJV). The first workshop, *Visioning and Strategic Planning for Your Ministry/Organization*, presented by the Rev. Dr. Rick Horst, was based on Kennon Callahan’s book, *Twelve Keys to an Effective Church* (Jossey-Bass, 1997).

Workshop 2: Governance

Congregations are adept at leadership through a model which has its roots in the Protestant Reformation (or even the Bible) where elders form a session to provide a caring governing structure. However, most of the specialized ministries in our denomination (Christian day care, camps, inner-city ministry, boarding house ministries, supportive housing, and so on) use a board structure. This workshop, led by the Rev. John Henderson, looks at some general features – whether a board or session – of good governance.

Workshop 3: Fundraising and planned giving

The Bible – and Jesus – both have a great deal to say about money and our attitudes towards money. This workshop, with the Revs. Herb Gale and Kirk Summers, along with Heather deSilva, explores principles and planning for fundraising and planned giving.

Video

The accompanying video from the Specialized Ministry Conference can be found at www.presbyterian.ca/specializedministry. This video will be referred to for viewing several times in this booklet.

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Workshop 1: Visioning and Strategic Planning for Your Ministry/Organization

Presented at the Specialized Ministry Conference, Crieff Hills Community, Ontario,
December, 2008

Workshop Leader: Rick Horst

Who should be invited to a workshop like this?

Invite to *Step 1* and *Step 2* of this process people who care about your ministry – staff, leaders, “users” of services, participants in programmes, people of all ages. (Children may be included with the help of adults.) Invite outside groups or people who care about your ministry.



Provide a hospitable setting with snacks and beverages. If you have a large group or guests, provide name tags.

Step 1: Get started to think about visioning/strategic planning

Choose from the following activities:

- Divide the group into pairs or small clusters. Invite the group members to dream about what your ministry/organization could look like in five years. What do you think God is inviting you to do?
- Ask the group to identify strengths in your ministry/organization.
- Invite group members to think of biblical characters who followed God. What characteristics did these people have? What can you learn from their stories?
- On segment one of the video, listen to Rick reflect on which comes first – a vision or a plan. He also lists characteristics of a strategic plan: it is updated annually, brief, easy to read and interpret, flexible, easily implemented, measurable, and so on. (The segment is about three minutes long.)

Step 2: Explore visioning/strategic planning

Using the following chart (provide a paper handout or display the chart using a projector), explain the four aspects of a strategic plan (planning for the future of your ministry/organization). These are not necessarily sequential, but can be. Explain that this workshop focuses mainly on the third aspect, but that a small *Planning Group* will carry forward the work of aspect four. The work of aspect two will be the responsibility of your church session or your organization’s board. Aspect one may also be done by the church session or board, or it may be done by an ad hoc group that reports back to the ministry leadership.

Four aspects of a strategic plan

1. A realistic assessment

Compare yourself to others who are doing something similar that is effective. How are we being effective?

2. Choosing the primary direction

It is important to *choose*; many strategic plans fail simply because they are not put into action.

3. Assessing the strengths

In this workshop, to assess strengths, you will use *Twelve Keys to an Effective Church* as defined by Kennon Callahan. (Jossey-Bass, 1997)

4. Selecting keys, objectives, timelines and persons responsible

Who, what, where, when...will things get done?

Step 3: Begin a plan

a. Prior to the meeting, make 12 signs to display each of the keys to an effective ministry and post them around the room.

b. Hand out copies of the following chart, which outlines the 12 keys to an effective ministry (see below). In small groups or pairs, invite participants to rate your ministry/organization on a scale of 1 to 10, with 10 being excellent. You may use the chart for the ranking process, but then each group's rankings will be transferred onto individual post-it notes.

12 Keys to an Effective Ministry

Relational Keys	The first six keys are usually the source of most satisfaction.	Our ranking of these keys on a scale of 1 to 10 (10=excellent)
1. Specific missional objectives	Why are we here? If we weren't here, what difference would it make? What is the particular niche our ministry addresses? What specific programmes do we offer for a particular hurt or hope?	
2. Shepherding	How do we keep connected in people-to-people ways? How do we do pastoral/lay visitation? How do we pay attention to the ways we offer help and hope? Is there a real connection? Are we listening for hurts and hopes? Do we have strong gifts in this way? Are we targeting the right people who need shepherding? What kind of shepherding is happening for people who aren't in the congregation?	

3. Inspirational worship	Do people leave our worship feeling inspired and renewed? Is there joy, happiness and contentment in our worship? Are people motivated to follow Christ and to serve others? Is there some variety and freshness? Are the sermons inspirational and faithful to the gospel? Is music of excellent quality and uplifting? Are people of all ages included?	
4. Relational groupings	Do our groups offer roots? friendship? support? Are there groups of some kind for all the ages represented in our congregation/ministry? Are our groups open and hospitable?	
5. Leadership team	Is the leadership team collegial? Does it have a good balance of personalities and skills? Does it have an agreed upon vision? Does it do what it sets out to do?	
6. Decision-making/governance	Do we have clear and helpful processes? Are our core values reflected in how we govern? Are there clear, articulated policies and working procedures? Are roles clear? Is there joy in serving?	
Functional Keys	These six keys may be the source of least satisfaction, but are, nevertheless, very important.	
7. Programmes/activities	What programmes and activities are offered? Is there something for all ages represented in our organization? Are there specific leadership or oversight issues in our programmes? Are programmes and activities evaluated annually?	
8. Accessibility	How do people get at what we offer? Are there barriers to accessibility?	
9. Visibility	Do people know who we are? Do they know our leaders? Do they know where we are located? Do we have good signage?	
10. Land	How important is land to our ministry? What are the advantages and disadvantages of our particular property?	
11. Facilities	What are the advantages and disadvantages of our facilities? Are the facilities up-to-date? Do they need a lot of maintenance?	

12. Financial resources	Are the financial resources adequate? Do the expenditures reflect the mission and purpose of our ministry/organization? Is money seen as a necessary evil or the generous response of our giftedness?	
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c. Invite small groups to post their group ranking post-it notes on the various signs posted around the room. You will get a good visual sense of which keys are considered strong and which are considered weak. By consensus, decide on a common ranking for each key. Here is an example of how this might work:

- two groups give “shepherding” a score of 8, but one group gives it 6. Ask if you can agree that shepherding can be ranked 7.

Or another example:

- two groups give “leadership team” a 9, but one gives it a 5. Talk together about why these scores are so far apart. Perhaps, after discussion, the last group, with more clarification, may wish to move their number to 9 to match the others.

d. As a single group, choose two keys that are strengths and two other keys that are not so strong. (Ranking of 8, 9 or 10 is considered strong).¹ For each of these, create one objective that would advance this key. Here are some examples:

- Relational groups ranked high. A new objective might be to add another group.
- Visibility is a concern in your church, so you decide that an achievable objective might be to put a float in the Santa Claus parade.

Step 4: Invite a small *Planning Group* to put together a plan

Turn the next step over to a *Planning Group* for some “tinkering” or refining. Why? It is difficult to do the detailed planning in a large group without getting bogged down.

This *Planning Group* should be suggested and recruited by the people who planned this event, so that they can choose people with specific skills. (It is best to avoid “nominations from the floor” as this may not generate the skills needed for the task.)



This *Planning Group* should include some people of vision, some who are strategic thinkers, and some who love detail. (It may also be that the session of the church, a committee, or an existing group has the skills to perform the function of the *Planning Group*.) It is important that this task is not referred to one “inside” group or an individual. It needs broad ownership.

¹ You may wonder why you would spend time on the weaknesses if they require much more effort. Why not just focus on what you do well? According to the *Natural Church Development* programme, when ministries/congregations focus on improving their weaknesses, it automatically raises the strengths as well.

These are the tasks of the *Planning Group*:

- Recall the conversations and rankings of the larger group.
- Gather about four of the keys and develop objectives that will advance each key. (It is probably manageable to work with four or five of the keys and to return to others in a subsequent year.) In an area of strength, two to four objectives will advance the key. In an area of lesser strength, it will take four to six objectives and more work.
- Set a timeline and develop an action plan.

What?	Who is responsible to see that action follows?	Where will this happen?	When will it happen?	Resources/help needed

The result of this *Planning Group* is a draft plan that goes to your session or the official board of your organization for some approval process. It is okay to invite slight changes in the plan at this point, but if there are major objections, it indicates that the official leaders in your ministry/organization do not “buy into” the plan. This is probably a sign of deeper trouble. The process should be stopped so this issue can be resolved.

When the plan is approved, prepare ways to communicate the proposed changes – through a brochure, PowerPoint presentation, posters, newsletter. Communicate clearly, broadly and often.

Evaluate

You will discover that, at the end of year one, not all things unfolded as you wanted, but some may have exceeded all expectations. Revisit the plan using a shorter, more informal process such as a coffee party or retreat. What worked well? What should be modified? Should one key be put on the back burner in order to work on another?

After three years, it will be necessary to repeat the full strategic planning process again.

Workshop 2: Governance

Presented at the Specialized Ministry Conference, Crieff Hills Community, Ontario,
December, 2008

Workshop leader: John Henderson

Step 1: Get started to think about governance

Choose one or all of the following activities:

- Invite members of the group to finish this sentence in as many ways as they can: “When I think about the governance of our organization...”



- Post around the room words that relate to the specific governance you have in your organization, such as executive director, board, ownership, policies, evaluation, vision, mission statement, job descriptions. Invite people to study the words, then move to a word that they believe they understand. Ask each person to explain what the word means to him or her. If others have different opinions, allow a brief time of discussion.

- Post four signs – not involved, new, experienced, long time – on one wall of your meeting area. Invite the members of your organization to stand beside the sign that best describes how long they have been involved in the organizational life of your ministry. Invite reflections. Some people may say, for instance, “Wow! I didn’t realize how many long-term people we had on the board. Do we need some new blood?” or “I’m surprised that so many

people came to this meeting who are not yet involved. I’m wondering whether this indicates an openness to becoming involved or some fear about coming on our board.”

- Listen to segment two of the video as John reflects on the following topics: why governance is important; the importance of clear structures; governance as an issue of trust; the importance of clear job descriptions; creating a climate where everyone can do their best possible work. (This segment is about three minutes long.)

Step 2: Explore governance

- Explain to the group that there are many different models for providing governance and oversight of a ministry, specialized ministry, or not-for-profit organization. Many of the elements in the checklist below come from the Carver Governance Design, but they also represent some general good principles of caring and overseeing the work of a ministry/organization.

Using the chart below, work in groups or pairs to evaluate the strength of your current board.²

Purpose of ministry/organization	We believe we are excellent	We believe we are okay	We believe we need to improve
We have a clear and easy-to-remember mission statement that directs us to the future.			
We make people (the “clients” in our ministry) the number one priority.			
We assume primary responsibility for this organization.			
We assume primary responsibility for the excellence of the programming in this ministry.			
We ensure that this ministry is available to a wide group of people.			
We have a clear idea of the “ownership” of our organization and we stay in touch with the ownership. ³			
Process			
We prescribe the purpose (end result), but we stay out of the means and let the executive director/ministry direct.			
When necessary, we assume the responsibility of saying what is unacceptable in the organization/ministry.			
We have clear by-laws and policies.			
Our by-laws and policies are seen as living documents and are updated regularly.			

² If you do not use the term “board,” simply substitute the term used in your organization/ministry, such as “oversight committee” or “session.”

³ “Ownership” is different from “membership.” Staff, board and members may value and appreciate the organization but “ownership” comes from individuals and groups in broader circles who care deeply that the ministry/organization continues.

We keep our sight on the large issues before attending to or delegating attention to smaller issues.			
The board speaks with one voice, or not at all.			
Board committees are to help the board do its job, not to help or advise the staff on its job.			
We have a clear understanding of who in our organization makes external reports or press releases and who thanks donors.			
We have the ability to respond quickly to changing situations.			
Board and staff			
We encourage our executive director ⁴ to create a climate in which each person can do his/her best possible work.			
The executive director provides regular reports on the progress of the ministry/work.			
We have a clear set of boundaries within which the executive director may operate. ⁵			
We provide the executive director with an annual performance review. ⁶			
We provide an annual self-evaluation of the performance of the board.			
We have clear definitions of the role differences between board members, officers, and staff. (Each person knows what his/her job is and what it is not.)			
We ensure that all staff have clear job descriptions.			
We are clear about the expectation that our board members will be out in public and will publicly promote the agency/ministry.			
We expect some staff or clients to come as guests to the board to keep the board excited and in touch with the ministry/work of the agency.			
Membership and recruitment of board members			
We set criteria for whom we need as board members.			
We interview prospective members and express our joy in serving on the board as well as stating our expectations.			

⁴ The term “executive director” is used in this document. If this is not the term used in your ministry/organization, substitute the term that is more appropriate, such as “chairperson” or “minister.”

⁵ Many of these limitations are for the protection of the executive director and the organization. They will include financial management procedures, asset protection, insurance, directions as to how staff are to be treated, and so on.

⁶ This, of course, is not the case for a congregation. Sessions do not provide a regular review of their minister. Presbyteries have responsibility for the oversight of the minister through the regular presbytery visitation.

We value a diversity of opinions, but we also function as a unit rather than disparate parts.			
If we cannot find a member with the specific skills we need, we are comfortable leaving the position vacant while continuing to search for the correct person.			
We give each new board member an orientation and a binder outlining the mission, by-laws and policies of the organization.			

After pairs or groups have completed working on this chart, spend some time discussing areas that are strengths and areas that should be lifted up as concerns.

Summary and conclusion

Invite people to list things that they learned about governance as a result of their time together.

Prepare to follow up on this workshop by filling out the following chart.

What?	Who is responsible to see that action follows?	Where will this happen?	When will it happen?	Resources/help needed

Special Note:

At the Specialized Ministry Conference, Mary Fontaine of Hummingbird Ministry suggested that, to First Nations ministries, the Iroquois confederacy circle model of governance works well. To explore this model, visit www.saskschools.ca/~aboriginal_res/gov7.htm.

Workshop 3: Fundraising/Planned Giving

Presented at the Specialized Ministry Conference, Crieff Hills Community, Ontario,
December, 2008

Workshop leaders: Kirk Summers, Herb Gale, Heather deSilva

Who should be invited to a workshop like this?

Invite people who are interested in and/or skilled in fundraising in your ministry/organization.

Provide a hospitable setting with snacks and beverages. If you have a large group or guests, provide name tags.

Step 1: Get started to think about fundraising/planned giving

Choose from the following activities:

- Invite each person to complete this sentence:
“When I think of fundraising/planned giving...”

- Invite the group to read and discuss the following biblical passages. Then ask, “What does this passage say to us about money?”

2 Corinthians 8:9–10

1 Timothy 6:17–18

2 Kings 4:1–7

Acts 4:32–37



- Talk about this phrase, which Herb Gale uses in his presentation: “Giving and stewardship are our response to giftedness.” Ask each group member to express what this phrase means to him or her.

Step 2: Explore fundraising/planned giving

- As a group, make a list on chart paper of reasons why people need to give. When you are finished, ask, “How does this list affect how we ask people to give?”
- Play segment three of the video. Listen to what Herb says about people’s need to give.
- The three presenters – Kirk Summers, Heather deSilva and Herb Gale – suggest that there are two main ways that people can give:
 1. Fundraising
 2. Planned giving

- Listen to segment four of the video, where Kirk, Heather and Herb discuss aspects of fundraising and planned giving. Kirk reflects on 2 Corinthians 8:9–10. Heather talks about the importance of having a willing heart and how this motivation for giving helps us become more God-like. Herb tells an inspiring story about the need for everyone – including children – to have an opportunity to express generosity.
- Photocopy the following box on aspects of fundraising. Distribute it to the group.

Aspects of Fundraising

signature event (something you do every year and which everyone expects; an example: selling pink ribbons in support of breast cancer research)

capital campaign (an ongoing fundraising endeavour for large needs such as a new building, a new water/sewage system, an expansion of a large programme)

special event (an occasional event which arises from someone’s passion; an example: two little girls from Scotsburn, Nova Scotia, ask for food goods to be brought to their birthday party, then present their wagon loads of food at a church worship service)

Make a list of the signature events, special events, and/or capital campaigns that your organization planned in the last year. Do you see any patterns? Are you short on one kind of event? Do you have a signature event that has grown tired? Ask, “When we do an event – either signature or special – is it clear what we are raising money for? Do we clarify whom we are reaching out to?”

- Post the following principles of fundraising. (You will want to refer back to these principles when you are putting together your fundraising/planned giving plan for the year, so it is helpful to photocopy this box to give to participants.)

Principles of Fundraising

1. Identify/articulate the need. (Explain why someone might want/need to give to this project.)
2. Heighten the awareness. (Ensure that the potential donors see evidence of the fundraising efforts in their community, church or neighbourhood.)
3. Provide the opportunity to give. (Remember to ask people to give. Cultivate relationships. Ask in the right way. Consider the setting and timing.)
4. Practice good donor care. (Thank donors often and properly. Thank them in a manner which is appropriate to them. Let them know how their gift was used.)

- Photocopy the following box on planned giving. Distribute copies to the group.

Planned Giving

Planned giving is about discovering new money to fund ministry in years to come. There are many ways to make a planned gift: wills and bequests, RRSPs and RRIFs, life insurance, publicly traded securities, charitable gift annuities, gift-plus annuities, gifts of residual interest, charitable remainder trusts.

As a group, discuss the planned giving plan of your organization. If you do not have one, ask yourselves why this is so? Are you depriving people of the opportunity to give? Are you afraid to ask?



In his presentation, Herb Gale explains that there are two pockets from which we give – **current income** (job earnings, pensions, investment income) and **accumulated assets** (real estate, investments, inheritance, etc). Planned gifts come from the second pocket.

Sample Idea:

A fundraising idea from Camp Douglas

At an annual signature event, the staff at Camp Douglas create an Inspiration Station. Everything in the station has a dollar tag on it, and attendees are invited to support one item.

Sample Idea:

A special event planned by a child

Heather's 12-year-old son was taken in the van to distribute food and hot beverages to homeless people in downtown Toronto. Afterward, he noticed that homeless people were in great need of socks. So, with the help of others, he created a special event – Sock-it-to-me.

Useful Tip:

Notes on capital campaigns

From time to time, in the life of any organization, it is important to launch a capital campaign for large needs – a new building, a new water/sewage system, an expansion of a large programme. Like all other fundraising endeavours, it is critical that the campaign has a high level of excellence and communicates what the organization is about. Capital campaigns can be as little as \$500,000, but are usually more. When planning a capital campaign, it is helpful to engage someone with specialized expertise to help with the campaign.

Useful Tip:

Dream big

Thinking of sending out a tear-off strip in your campaign letter asking for gifts of \$10, \$20, or \$30? Remember that 80% of your money will come from 20% of your people. To ask people to donate \$25 when they could donate \$2500 doesn't make sense.

Step 3: Put together a plan

Many worthy plans do not have any effect simply because people or organizations fail to put them into action. Use the following chart to formulate a plan and put meetings and times of accountability into place so the plan gets carried out. (Remember to refer back to the fundraising principles found on page 13.)

Fundraising/Planned Giving Plan for _____

Type/name of event⁷	Articulated purpose of event	When will it be done?	Who are the primary people responsible for the event?	What is the action plan (sequential steps) that need to be followed?	Who will evaluate the effectiveness of the event? How?

⁷ The term “event” is used here, but you may wish to substitute “approach” or “campaign” or “activity.”