Sustain Track

This Leadership Academy learning track is designed to empower church plant core team leaders and newly-affiliating churches whose new church projects recently launched to develop strengthening practices to grow and maintain a sustainable ministry.

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Overview

This journey is designed to help you navigate life in ministry using the essence of the Creator – spiritual strategy and creativity carefully channeled through compassion and missional intentionality. The goal of Hope Partnership for Missional Transformation is to help you discover the ways God is calling you and your team to live out the Great Commission: changing lives and changing the world (and perhaps managing a church along the way).

How do we start and oversee sustainable churches in consideration of the current state of society? In a recent article series titled *Church-Planting Shifts*, Ed Stetzer highlighted some important implications:

- Christianity in the West will be competing more with a secular worldview than it has in the past, when Christendom reigned.
- With the rising tide of secularism and the ultimate decline of Christian nominalism, we may need to rethink our denominational/traditional church support mechanisms.
- We need to take more time to establish credible and significant roots in a secular community that may not be antagonistic to the Christian faith, yet question its overarching importance to life.
- Secular contexts are more complex and require a completely different set of skills, personnel, support, infrastructure, models, and funding.
- A fundamental assumption that self-sufficiency can be attained in three to four years is unrealistic while pastoral motivation for self-sufficiency as a primary driver toward attaining whatever assumed goal is faulty.
- Bi-vocational ministry is a good option to both exert influence from within secular society and create a context within which the people of God can live out the gospel and the love of Christ.
- Secularism may indeed even be seen as God's answer to a complacent and complicit church by providing an unfamiliar, somewhat tainted environment within which the Christian stands out as a shining example of a life to be lived empowered by the Spirit of God.
- Secularism may return the Church to its original mission of bringing the gospel to people for whom the ethics of Christianity seem countercultural.
- The Church must learn lessons from the past that will empower witness and mission in secular contexts where the gospel is yet to take root and transform lives from the inside out.

The **Sustain Track** is designed to help leaders discover, develop and deliver purposeful ministry infused with sustainable practices to ramp up your startup. It's about having the courage, as a leader, to reexamine and re-vision your shared values while collaborating with the Chief Co-carpenter to construct relevant and influential churches.

Let's start by swallowing a humility pill that intoxicates to the point of pure, prideless acknowledgement of this discovery: OVERSEEING A CHURCH IS HARD WORK! It's easy to covet from the corner the ultra-sensationalized and charismatic new church leader. The reality is, to answer this call you must be courageous, and frankly, prepared to be called a fool. Now is the time to proudly proclaim your peculiarity and unapologetically forge unfamiliar frontiers.

Success is rooted in having a solid plan. This week, we go beyond a boring business/ministry plan to create goals you can't wait to carry out daily. We have missionally-mutated methods from Natalie MacNeil's book, *The Conquer Kit*; Wiley's book, Design a Better Business; various online sources; and our collaborative skills, education, experiences and wisdom to develop the **M&Ms of Missional and Sustainable Ministry Planning**. We will work together to map out a living plan with which to adapt for church management scalability.

The M&Ms of Missional and Sustainable Ministry Planning

Motivation, Movement, Mix, Money, Messaging, Merger, Mission, Metrics & More:

1. **Motivation** (Vision) – What motivates you to succeed? Take a look at the passion behind your goals and the beautiful bones of your big vision.
2. **Movement** (Programs, Projects and Participant Placement) – In what way will you impact the world? What can you do that both makes God smile and makes you feel most alive? Pour the powerful perspective you need into impactful activities.
3. **Mix** – From your name to your processes to your structure and financial stewardship; you'll build a workable, sustainable platform for your ministry to stand on.
4. **Money** – Feel empowered rather than frazzled about your finances. We'll dive into your mindset and survey the savvy systems you need to prosper.
5. **Messaging** – Discover how easy and fun it can be to create compelling and contagious content, craft your story, and become a more confident ambassador for Christ's cause.
6. **Merger** (Team Building) – Find the right help. With whom do you need to join forces? We'll equip you with the insight and ideas your need to build your dream team.
7. **Mission** – Take a missional approach to setting big goals and achieve them. Strategic planning on steroids.
8. **Metrics** – How do you know you're making the right decisions? How will you know if any of this really works? It's time to shift our focus from activities to outcomes.
9. and **More**...

Sustain Track Purpose

What's our joint purpose as a Sustain Track cohort? To instill practices intended to ensure your ability to continue over a period of time. In other words, rebuild sustainable churches.

This track operates under a few assumptions and prerequisites:

1. You are successfully overseeing a fairly new church.
2. You have completed and implemented the basic principle introduced during the Leadership Academy Start Track (formerly New Church Training) or similar/equivalent training which includes the development of a:
    a. Future Story
    b. Vision, Mission and Values

Hotelwork: If you have not completed these items, prepare tonight. Review the Hope video on Future Stories.

Resources
Reaching Sustained Health: What Churches Can Learn From Businesses
Be the Church Planning Guide

Ignite with PCP

PCP stands for Power, Confidence, and Passion.

Level Setting

Sustainability

- the ability to be maintained at a certain rate or level. (google.com)

- ability to maintain or support an activity or process over the long term. (businessdictionary.com)

- the ability to be sustained, supported, upheld, or confirmed. (dictionary.com)

- being a method of harvesting or using a resource so that the resource is not depleted or permanently damaged. (merriam-webster.com)

- able to be used without being completely used up or destroyed. (merriam-webster.com)

- the ability to continue a defined behavior indefinitely. (thwink.org)

- sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs. (thwink.org)

- nonprofit sustainability occurs when a nonprofit attracts and effectively uses enough and the right kinds of [practices] necessary to achieve their long-term outcome goals. (socialvelocity.net)

Motivation

Vision

It takes courage to actually start or lead a church. Have you ever wondered, "How did I get chosen for this job?" Take a moment to celebrate that you not only were called, but you said, "YES!"

During the ***Motivation*** section, you will:

- Get laser focused on what you really want and why you want it
- Align yourself with the kind of future story you are called to create
- Identify who you want to serve
- Eliminate the demotivators that block your ***flow***

Flow – your natural state.

Future Success Meditation

Daily prayer and meditation allows you to be the oak tree in your ministry.

Jeremiah 17:7-8
Blessed are those who trust in the Lord, whose trust is the Lord.
They shall be like a tree planted by water, sending out its roots by the stream.
It shall not fear when heat comes, and its leaves shall stay green; in the year of drought it is not anxious, and it does not cease to bear fruit.

Eliminate Demotivators

Demotivator #1 - Clutter

Sometimes our lives are too full for our mission, our goals, and the purpose we are meant to achieve.

Homework: To get started, pick one day of the month to clear out a frequently used area of your ministry – your office, a closet, a drawer, your cell phone, or a desktop folder. Give your day a fun name like Tackle Tuesday or Weed-Out Wednesday.

Mark items you're unsure about and come back to them next month. The longer they sit unused, the more obvious it will be they need to go. If something doesn't simplify your life, if it does not give you joy, consider removing it. You might sense resistance to letting go. You may feel an obligation to keep a child's art or a gift from a church member. Recognize your internal clutter for what it is and kiss it goodbye. You'll feel freer afterwards.

Each time, journal how you feel once you have eliminated these minor demotivators.

Song of Solomon 2:15
Take us the foxes, the little foxes, that spoil the vines: for our vines have tender grapes.

Demotivator #2 – Doubt
When you know who you are (and, more importantly, who God is), what you want (and, more importantly, God's divine will) and why you really want it (and, more importantly, God's divine purpose); is there anything that can stop you from achieving success?

Giants! A giant is anything that poses an *implied* threat that leads to doubt.

Demotivator #3 – Overwhelm
Developing a new church while managing a career often means working two full-time jobs. And, needless to say, you're feeling a bit overwhelmed.

Exercise: Write a list of the top 10-20 things you need to complete by the end of the year.

Use the "4 Ds." Once you have your to-do list written, whittle it down by employing this well-known time management technique. The "4 Ds" stand for Delete, Delegate, Delay and Do:

Resources
Getting Organized is Not Anti-Mission
Your Brain Can Only Take So Much Focus
5 Questions to Ask About Corporate Culture to Get Beyond the Usual Meaningless Blather
Your Vision May Not Be What You Think It Is
7 Things All Churches Want
There Are Only Three Ways to Get More Done
The Most Important Thing You Manage Isn't Projects or People
5 Lists You Can Make To Help Ease Your Anxious Mind
4 Ways To Delegate Before It's Too Late

Movement

The 3Ps - Programs, Projects and Participant Placement

During the ***Movement*** section, you will:

- Discover ways you will impact the world
- Realize what makes God smile and makes you feel most alive
- Pour the powerful perspective you need into impactful activities

> **Movement**
>
> - the passion and momentum that drives your programs, projects and participant placement.
>
> - the creative catalyst that connects the Creator, the collective (local church), and the community.
>
> **Collective** – the internal participants of the church often classified by regular attendees, members, volunteers and supporters.
>
> **Program** – events and ongoing initiatives of the collective.
>
> **Project** – a singular initiative of the collective.
>
> **Participant Placement** – The activities, duties and ways in which you use your collective.

With the Holy Spirit's guidance, we will tap into our God-gifted ***entrepreneurial*** DNA and generate new ideas, and make decisions about which of our brightest ideas deserve our undivided attention.

> **Entrepreneurship** – the process of designing, launching and running a new business, or offering a product, process or service. (wikipedia.com)

Nehemiah 6:3
I knew they were scheming to hurt me so I sent messengers back with this:
"I'm doing a great work; I can't come down.
Why should the work come to a standstill just so I can come down to see you?"

If you are already clear on your current and future programs, projects and participant placement, you can still use the following exercise to make sure your Movement is in total alignment with God's missional vision, values, and venues.

Resources
Netflix, TED and the Future of Preaching
The Cool Pastor

Movement Mania

Homework: You'll need:

- a camera (your phone will do)
- a notebook (or note-keeping app)
- comfortable walking shoes
- spiritual eyesight and missional mindset

This mission is designed to get you to really think about the kind of 3Ps and missional experiences you love and why. It will give you a ton of inspiration fuel, so you can start dreaming up ways to craft similar experiences for your collective and community.

Sometime in the next few weeks, head out to some of your favorite ***third places*** or restaurants – the ones you walk in and think "I wish my church made me feel like *this*!"

> **Third Place** – the social surroundings separate from the two usual social environments of home ("first place") and the office ("second place"), such as a cafe, club, park, church, etc. (wikipedia.com)

While you're in there (be sure to visit at least three different locations), take a good look around. Take pictures of the products, décor, or small customer-centric details that catch your eye, provoke nostalgia, or spark your spiritual flame.

After that, take yourself on a date to your favorite café or restaurant for a little treat and at least half an hour of uninterrupted, inspired, Spirit-led brainstorming.

Review your pics and record your observations on the left-side of the table below.

What did you like and why? What did you keep coming back to? Then jot down some ideas about how you can create similar meaningful experiences in your church through your 3Ps.

Planting the Participants

For much of your church planting journey, placing (and sometimes replacing) the participants will take priority. Assigning people to the right functions according to their flow is paramount.

Participant Placement has several purposes (lifeway.com):

- helps participants connect to the mission-driven environment
- empowers participants to be actively involved in the mission of the Church
- participants serve as a invested assets for the growth of the collective
- a spirit of solidarity is developed towards the goals of the collective
- participants build confidence and feel valued
- leadership qualities are enhanced for the improvement of the community

Plug participants into their flow as soon as possible.

Moving to the Sweet Spot

Jim Collins, author of *Good to Great*, introduces in his book a principle he refers to as the Hedgehog Concept as a defining attribute of great businesses. His notion provides a concrete rubric for identifying an organization's core strength.

Life Coach Lisa Hoashi provides on her blog a creative adaptation to this concept The Sweet Spot Exercise: Get Ideas for the Next Great Move in Your Career.

Homework: Try the "Sweet Spot" exercise for yourself or your collective. It uses a Venn diagram to discover the intersection of three things about you:

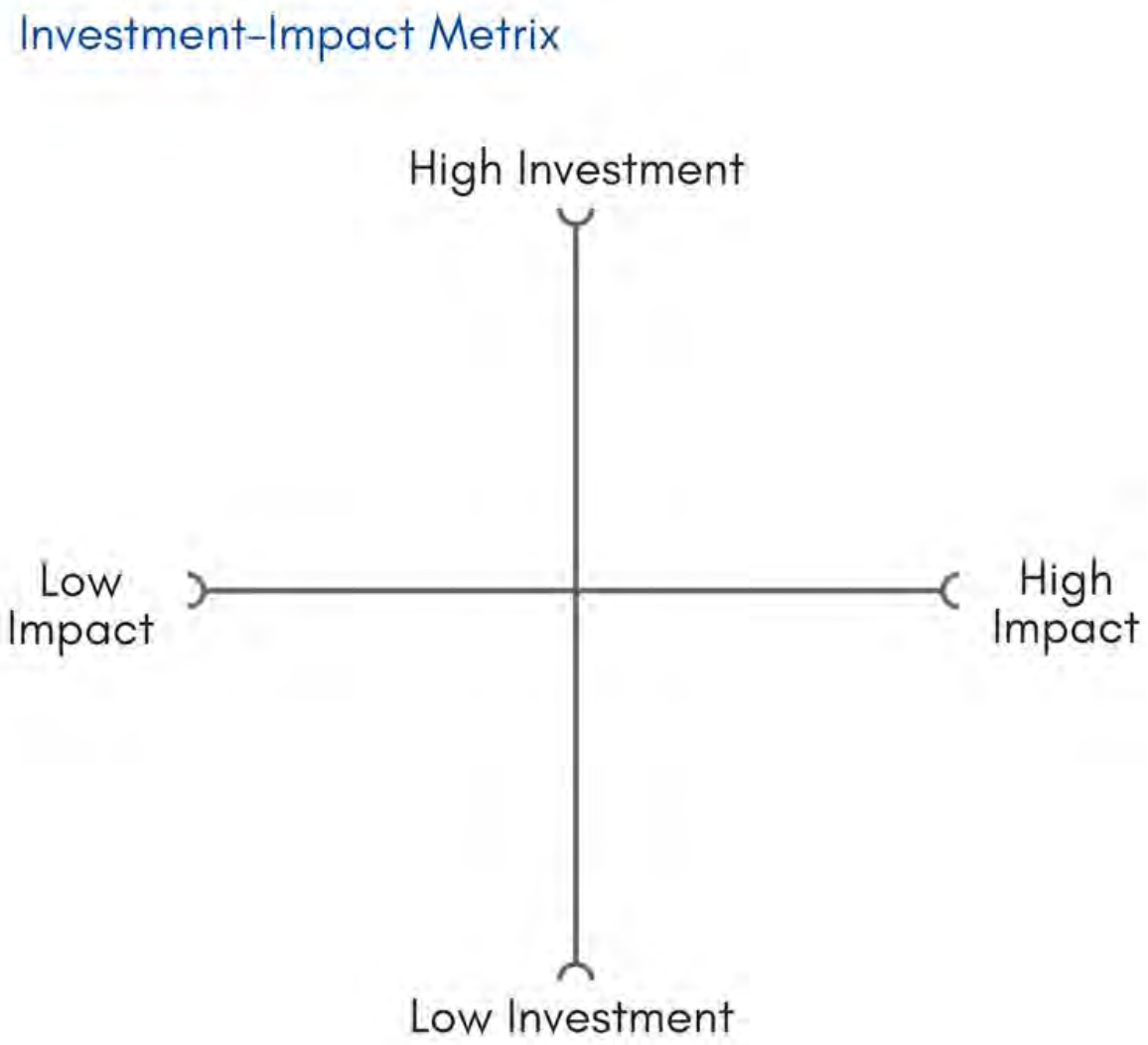
1. What you're good at
2. What you love to do
3. What the world needs (and would pay you for!)

According to this rubric, great organizations operate best where these three important concepts overlap. Use this exercise to discover what's in your own Sweet Spot, and you'll begin laying the groundwork for taking your collective from good to great.

Sustainability Stimulators on Innovation

1. You have lots of creative ideas but which are really promising
2. Categorize ideas with respect to your Collective Criteria
3. Use the **Investment-Impact Metrix** to identify meaningful investments

The Time Quadrant



Measure the effectiveness of your 3Ps by placing them in a respective quadrant.

- **Weak:** Low Investment, Low Impact produces feelings of apathy
- **Waste:** High Investment, Low Impact produces feelings of frustration
- **Wonder:** Low Investment, High Impact produces feelings of false excitement
- **Worthwhile:** High Investment, High Impact produces feelings of meaningfulness

Visioneering Participants

Visioneering

– a combination of the concepts of vision and engineering

– a vision is a destination with a plan. It is the course by which you somehow pursue turning dreams into reality. It is the multi-faceted, intentional, and painstaking process whereby ideas and convictions take on substance toward a goal. [christianmarriagespice.com]

– VISIONEERING = Inspiration + Conviction + Action + Determination + Completion

– the process of building your concept or dream into a workable application. [vision-adrift.blogspot.com]

Matthew 15:24
Jesus refused, telling them, "I've got my hands full dealing with the lost sheep of Israel".

Even Jesus had a ***target audience***. Those wandering sheep without a shepherd were the appointed objects of His care [Ellicott's Commentary for English Readers].

Target Audience

- the collective's ideal participants
- a particular group or social segment at which your Movement's Messaging is aimed

But before you can change lives, open hearts and propose a relationship with Christ, you need to know *whose* lives you're changing, *which* hearts you're opening, and *who* you're introducing. If you could take the roof off of your dream church, who would you see?

Imagine your target audience as characters in a story. Here is an example:

> *Gina is funny and outgoing. She lives in a loft on the north side of Chicago with her boyfriend and much-loved, poorly-trained rescue dog. She works as a personal trainer at a high-end gym, but she's losing faith in the fitness industry. She's thinking of changing careers, but she's not sure what she wants to do or where to start. She's inspired by setting and achieving physical goals, but she struggles with psychological and professional goals. She needs structure and training schedules to make things happen. She's pretty happy with her life, but she's haunted by a certain feeling of "Is this it? Is there more to life?" She spends her weekends hiking, cooking, and drinking a lot of black coffee.*

Numbers 13:17-20a
Moses sent spies out to the land of Canaan, and said to them, "Go up there into the Negeb, and go up into the hill country, and see what the land is like, and whether the people who live in it are strong or weak, whether they are few or many, and whether the land they live in is good or bad, and whether the towns that they live in are unwalled or fortified, and whether the land is rich or poor, and whether there are trees in it or not. Be bold, and bring some of the fruit of the land."

Create an insanely detailed picture of your ideal participant.

- What is your ideal participant's gender? What's their name?
- How old are they?
- Where do they live? Which city? Which neighborhood?
- Where did they come from?
- Are they outdoorsy or more metropolitan?
- What's their job? How much do they earn?
- What's their relationship status? Do they have children or pets?
- How do they spend their free time?
- What TV shows and music do they enjoy?
- What kind of outfit do would you usually see them wear?
- What problems do they wish they could solve?
- What do they eat for breakfast?
- What smartphone apps do they use the most?
- What do they spend Money on?
- How would their best friend describe them if them if they were being totally honest?
- What are their struggles and secret proclivities?
- What is their spiritual life like?
- What is their relationship with religion?
- What's one big dream they are open about?
- What's one big dream they are private about?

Whew! Feels like you know them for decades, doesn't it?

> **Exercise:** Write a paragraph about your dream participant's average Wednesday. Give them a name. Search online for a visual likeness of the person.

Sustainability Stimulators on Vision

1. Stick to your beliefs – it you don't, how can you ever trust others to do so?
2. Dare to be yourself – show up the way you would show up in your private life
3. Go beyond yourself everyday – only then do we commit ourselves to growth

Access Their Struggles

It's time to hone in on your participants' struggles so you can create the Movement to address those struggles and be used by God to solve those problems. Reflect on the story you wrote about your participant.

Zoom in on:

1. What your dream participants are struggling with
2. How can your collective participate in God's mission to help them?

And how are you going to do that? By doing your research or just straight-up asking them?

Exercise: Mobile Moment. Do a Facebook search for groups frequented by your potential participant. Try groups such as Single Moms in Seattle, Jazz-lovers in Utah, Korean Professionals in Oklahoma City, you get the idea. Simply search for "ideal participants" in "your city"

What to look for:

- What are they complaining about?
- What solutions are they suggesting to each other?
- What platforms and services do they mention?
- Can those problems be solved with a one-size-fits-all solution? Or do they need customized help?
- What are the things/services/community features they wish they had?
- How would their lives be improved if your collective could solve this problem for them?
- Does this problem cross age/cultural/geographic lines within the community? Or is it limited to on subset within the group?

Write a brief reflection on your findings.

Struggle Assessment in Real Life

Hotelwork: Now that we've described our ideal participant down to his shoes and pets, we're going to learn from the real-life versions. Like, the real, live human versions.

Let's say your ideal participant is a thirty- to forty-five-year-old woman. She's a wife and mom; is active; and has a busy, successful career. You suspect this type of woman would benefit from a meal delivery service (this is a good way to connect the fabulous cooks in your congregation with the agility-challenged members of community), but you'd like to pick some brains before you launch something big.

How do you find people to interview? Through social media and the friends you already have. Also, look to the current contacts in your phone and email. You should aim for five to eight interviews. To get started, write down the first ten names that come to mind that resemble the attributes of your target participant.

Text or Email: If you know a few people who meet the criteria of your ideal participant, text or email them (individually!) and ask if they'd be willing to chat with you for twenty minutes or allow you to buy them dinner in exchange for answering some questions. If you're not buying them dinner, always offer them something as a thank you – a gift cared to Amazon or Starbucks, for example.

Meet in a place or environment of their choosing: Anywhere but a location associated with your church. If you need more interviews, ask them if they know anyone who meets your criteria.

Facebook or Social Media: Write a post telling your friends that you're seeking insight from people who are [insert your criterion here]. Again, tell them that you'd be happy to buy them dinner or send them a gift card in exchange for their time.

Consider the importance of the geographic location of the interviewee. If this is not a major factor, open the invitation to people across the nation then meet with them by video stream. Here is a social template to get you started:

> *Hey. I'm working a new project that I'm pretty excited about – but I need your help! I need insight from a few [insert short criterion here]. Is that you? If it is – and you're here in [insert your city] – I'd love to buy you dinner while I pick your brain. If you're not nearby, perhaps we can set up a video call and I can send you a gift card. If you're willing, inbox me and we can get started!*

Your Network: People in your current collective or circle of influence are also perfect candidates. Are you part of any other associations? Networking groups? Social gatherings? I bet you are and I bet those groups are rife with people who could help you. Write up a slightly more professional version of the Facebook template and share it with the groups or announce it during your collective gathering.

Here is a chart to help you stay organized:

Platform I used to find participant	Date	Number of responses	Contact info for interviewees

Ask the Big Questions

So you've found some of those elusive ideal participants in real life. They've accepted your invitation to brain picking. Now what do you ask them?

Don't overthink this. The purpose of these interviews is to understand your ideal participant a bit better. What are their struggles? Where do go for solutions?

When you're interviewing these people, begin the conversation with a thirty-second explanation of your Movement. Tell them that they're an ideal participant in your ministry, which is why you want their input.

Here are a few questions to get you started:

- What was your knee-jerk reaction when I told you about my Movement? Be honest!
- Do you feel like it solves a problem that you're struggling with?
- If it doesn't solve the problem, what would solve the problem?
- Have you tried to solve this problem before? If so – did that solution work? If not, why not?
- What would you be willing to do to seek a solution?
- How would you want to receive this solution? One-on-one? Online? In a store? As part of a group?
- Do you have any suggestions for how I could make this better/more appealing/more helpful?

Exercise: Release, Review and Refine. Since your developing your Movement, it's time to put all your great ideas to put all your great ideas in one place.

Release

Write down every single Movement element you've got in the spaces provided. Put it all in there. Yep, even the stuff that's just been floating around in your head. Seeing all of it in one place will help you get clear about what you want to focus on and which concepts you feel most excited about.

Programs

Projects

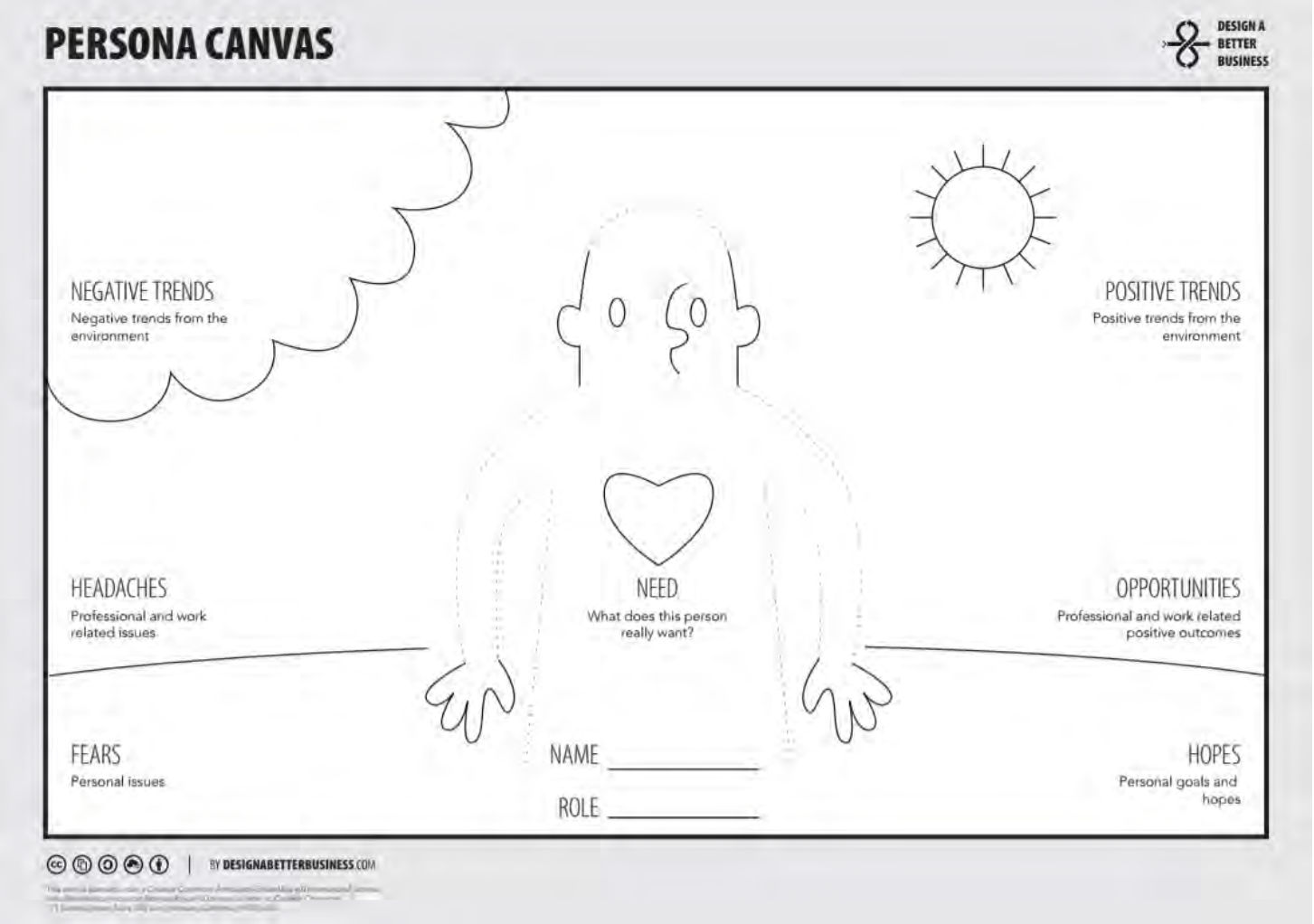
Participant Placement

Review
Considering what you know, take a look at the ideas you've jotted down and see what jumps out at you. What options would be the best fit for your target audience, their needs, and the way you dream to serve them?

Refine
Circle one to three ideas you feel would be the best fit for your target audience and missional direction. (Do not go over the three idea limit!) This will help you focus your efforts on these specific concepts, so you can really pour yourself into your ideas. Remember, no matter how anointed and gifted you are, you can't do everything at once.

Sustainability Stimulators on Idealizing Participants (Personas)

1. Use personas – image a face and name to make it easier to step into the shoes of an ideal participants
2. Create and share mental models to have a common language about several participant types
3. Focus on the positives too – positive trends the ideal participant experiences
4. Discover shared hopes – hopes for the future that intersect with those of the collective
5. Realize the remedy for headaches – these could be in work or private life
6. Use the Persona Canvas with your Merger and discuss what they might feel about an experience with your collective



3P Planning

Quick reminder: for your collective (the internal participants of the church often classified by regular attendees, members, volunteers and supporters), a ***program*** is an ongoing initiative a ***project*** is a singular initiative and ***participant placement*** is the way you use the participants your collective.

When you're planning, keep your current and future 3Ps in mind. When the right 3Ps are developed, they build on themselves and support the efforts of the collective.

Project and program development questions:

- Based on your research, what problems do your target groups face?
- How can you make your programs/projects better/different/more successful than others that address the same issue?
- When you take into account your feelings about similar programs/projects, would you like to create a physical product, a consulting offering, or an ongoing service?
- How does each program and project support/connect with each other?
- How will you promote Project B with Project A?
- Based on the success of Project A and the information you gather about your target and what amount of energy should be invested into Project B?

- How much does your program/project cost? (Think beyond Money to building overhead, human energy, planning hours, etc.)
- What's the duration of the program?
- How much time do you expect to spend on each project? How many of these can you do each year?
- Is there opportunity ***monetize*** your programs/projects?

> ***Monetize***
>
> - *to create a program, project, product or service that yields a profit*
> - *to convert non-revenue generating assets into sources of revenue*
> - *to convert any event, object or transaction into a form of currency or something with transferable value (merriam-webster.com)*

Resources
7 Great Ways to Monetize YouTube Videos
Top 7 YouTubers (and what brands can learn from them)
33 Ways to Monetize a Website (or a Blog)
8 Ways to Monetize Your Blog and Make Money Online

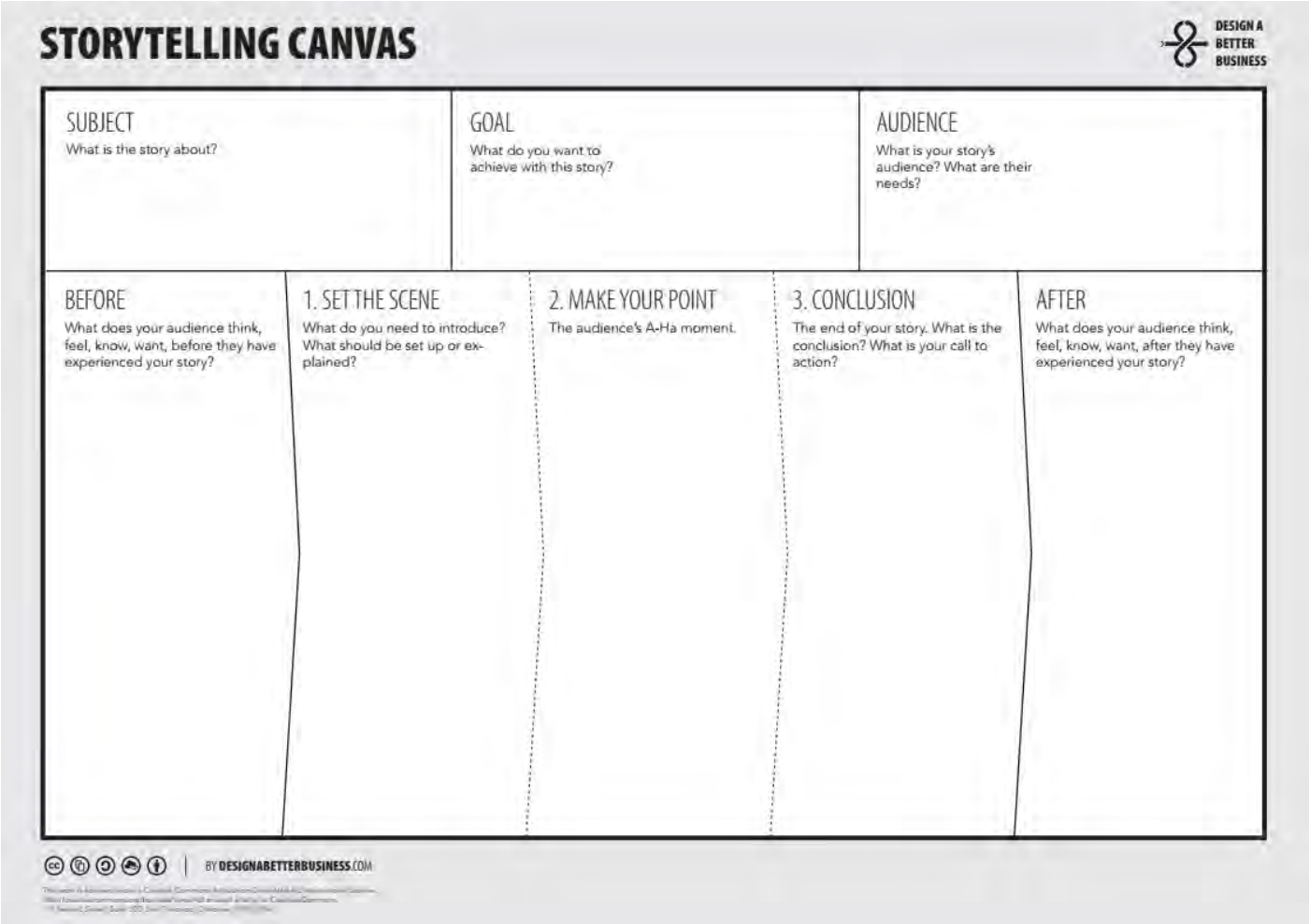
Program and Project Creation Checklist

When you're gearing up to create and launch a program or project, it's important that you have clarity about your audience. So, before you jump into the "build it" phase of your program/project, run through the following questions:

- Is there a demand for this program/project? Why?
- What's your missional and evangelistic strategy exactly?
- How will you make this look, sound, and feel professional? If you can't do it yourself, who will you recruit to help you?
- Does this program/project follow legal requirements?
- Are you clearly casting the vision?
- Will you include templates, checklists, and questionnaires? What will you be using?
- Do you plan to include a resource list? Who's going to be on it?
- Do you have a system in place to collect case studies and testimonials? What is it?
- Are you putting your best foot forward? How do you know?

Sustainability Stimulators on Storytelling

1. Have a goal – what do you want to achieve with your story?
2. Remember Jesus is the Hero of the story, not you!
3. Be meaningful – your story should change your audience in some way.
4. Come up with influential arguments – have a list of rational, emotional, and ethical points.
5. spend time with your Merger to come up with key ingredients
6. Facts & figures. These appeal to logic but can be boring.
7. Use a story canvas to collectively design stories that resonate: by harnessing visual, engaging, insightful, controlled, and inspiring elements.



Better Meetings via Screenplays

The key to good meeting – and even better workshops – is to create a screenplay. Here is an example template that can used to build a Call Sheet or Template:

CALL SHEET Event <Event Name> on <Date>

Who	Role	Responsibility	Contact Details
<Name>	<Role>	<Responsibility>	<Phone> <Email>
<Name>	<Role>	<Responsibility>	<Phone> <Email>
<Name>	<Role>	<Responsibility>	<Phone> <Email>
<Name>	<Role>	<Responsibility>	<Phone> <Email>

Location:	**<Location>**		
Date:	**<Date>**		
Timespan:	**<Start> - <Finish>**		
Time	**Topic**	**Activity**	**Who?**
09:00 **15 min**	**Setup and Introduction** <More details>	Why are we here? Agenda Roles & Rules Expected Outcomes	Pastor
09:15 **75 min**	**Block 1: Team Exercise** What is our long-term vision?	**Plenary: Explain** What is vision? (5 min) Explain vision mapping (10 min) **Team: Exercise** Divide into groups of 4-6 people Put sticky notes on vision themes and how this shows up (60 min)	
10:30 **30 min**	**Coffee Break**	**Capture** Capture flip charts Mark captured flip charts Prepare for next Block	Administrator
11:00 **90 min**	**Block 2: <Name>**	**Plenary: Explain** <Details> **Team: Exercise** <Details>	
12:30 **60 min**	**Lunch Break**	**Capture** Capture flip charts Mark captured flip charts Prepare for next Block	
1:30 **90 min**	**Block 3: <Name>**	**Plenary: Explain** <Details> **Team: Exercise** <Details>	
2:45 **15 min**	**End**	**Conclusions** **Next Steps** **Did we reach our Goals?** **Prayer**	

Sustainability Stimulators on Meetings

1. Be early – arrive early to make sure everything works
2. Agenda, roles, rules – agree on these as a team
3. Blocks – try to keep all time slots between 15 – 20 minutes
4. Breaks – never skip them
5. Wrap-up = come back to the objectives and make sure everything is covered.

Mix

Name, Structure, Support, Accounting

During the ***Mix*** section, you will:

- Reimagine your collective's name
- Implement new processes
- Develop structure
- Improve financial stewardship
- Build a workable, sustainable platform for your ministry to stand on

From your name to your processes to your structure and financial stewardship; now we'll build a workable, sustainable platform for your ministry to stand on. In this section we're covering the essentials that build a foundation for your collective that's strong enough to support the biggest, most audacious vision God has shown you.

The Right Name

Exercise: Tell the story of your church's current name.

A good name is meaningful, memorable, interesting, and marketable.

Names that Resonate

Exercise: List a few already established church names of that charge your spirit.

Exercise: Make a quick list of names that you have considered for your own ministry. Don't over-analyze why you like them and what they mean. Simply keep an ongoing list of names that speak to you.

Resources

7 Awesome Church Name Ideas
Contemporary Trends in Church Names
Naming Your Church Plant
The 9 Worst Kinds of Hilariously Trendy Church Names

The Name Test

Exercise: For this exercise, we'll be diving into the full 360 view of the church or 3P name you've chosen and whether it's the best fit.

Let's put your name to the test.

1. Is the name easy for people to pronounce? Yes No
2. Is the name easy for people to spell correctly? Yes No
3. Is there a URL available for it? Yes No
4. Will people be able to successfully get to the URL without you having to spell out the name for them? Yes No
5. Is your name short and sweet or a memorable phrase? Yes No
6. Is your name free of geographical specificity? Yes No
7. Is there a meaning that will resonate with you target audience? Yes No

After you finish answering all the questions, tally up the results. If there are more than two "no" answers, I recommend revising your church name.

The Right Legal Structure

Here are some legal essentials to familiarize yourself with:

- Get a good lawyer, no matter how small your church is now. It's great to have that kind of support in your back pocket. You need an expert in your corner should you ever be surprised with a serious problem.
- Sign up for a service like Adobe Document Cloud eSign to make sending and electronically signing contracts a breeze for you and the people you're working with.
- Nolo it! Nolo is the largest online legal resource, and while it's not a replacement for a lawyer, it's definitely a site to bookmark and visit when you need legal information.
- Use the trademark symbol (™) on things you consider to be your intellectual property including sermons. This will give you a basic level of legal protection. For example, if someone tries to register a trademark, and you can prove you've been using it for longer, you can lay claim to that mark.
- If a trademark is critical to your organization, it's good to register it. The registered trademark symbol (®) is reserved for trademarks that have indeed been registered. Not every entity needs to register trademarks, especially if you don't have the resources to follow up with people, send cease and desist letters, and monitor the web and publications for trademark violations.

Resources

How to Protect Your Church Name

- Depending on your area of jurisdiction, your industry, whether you have a brick-and-mortar church versus a virtual ministry, different licenses come into play. You might be surprised what businesses and offerings would require you to obtain some sort of license beyond just registering your business. Make sure you look into local, state, and national or federal licenses or permits that may be required for the type of organizations that you're overseeing.

Conquer Your Contracts

Have a contract signed for each person or service provider that you hire to help keep things moving.

Resources

The Legal Issues You Need To Know If You're Launching A Startup In 2017
5 Legal Steps for Starting Your Business

The Right Support Systems

In this section, we'll cover basic systems you'll want behind the scenes so you stay on track, organized and ready to grow.

Simple Systems Checklist

It may take a while to check off the items in the following list, so be gentle with yourself and give yourself a reasonable timeline. Do give yourself a timeline though, and actually get this stuff on your calendar.

1. **Have an operation manual ready to go:** This is going to be the second Bible of your church. Make sure you keep it current and easily accessible for yourself and your team. This document can include:

- Constitution & Bylaws
- Location information
- Membership
- Leadership & Officers
- Committees
- Budget and Finances
- Building and Property Use
- Church Calendar
- Contract templates
- Communications and Marketing Policies

Your manual should house anything and everything your team would need to run your church without you.

Goal completion date for this system:

2. **Create a process for volunteers and team members:** While we'll talk about this more later, I want you to start thinking now about the orientation process for team members. How available will you be to teach them? How are you going to make them feel quickly familiar with the way you do things? Being clear on this process is critical for managing the learning curve and helping new participants feel engaged and supported.

Goal completion date for this system:

3. **Design a strategy for managing prospective participants:** You should put a system in place to make sure you're regularly communicating with people who like what you do, but aren't quite ready to commit. The most important part of this process is regular communication. If you go six months without contacting a prospect, they might totally lose interest. Make sure you're clear on exactly what your church does to keep in touch with these supporters and encourage them to participate more.

Goal completion date for this system:

4. **Implement a process for onboarding new members:** How are you attracting new members and what happens after they decide to join? What are your plans for creating a seamless orientation? (You'll be mapping out your process shortly.)

Goal completion date for this system:

5. **Apply technology to manage your online presence:** Being visible takes some serious work! But, thanks to a few handy tools and apps, you can massively simplify your digital life. Some I find particularly useful: Hootsuite, Buffer, and TweetDeck for scheduling social media updates, PicMonkey and Canva for creating simple graphics, and Trello and Asana for project management. If you don't already have a mailing list, you can create one for free via MailChimp and tuck a signup form right into your website.

Goal completion date for this system:

Create Your Operations Manual

To compile your manual, create a file on your computer or set up a private document on Google Drive. You probably already have a lot of this information in different files so this might consist of a lot of copying and pasting to get everything into one organized document.

Your operations manual should include all business essentials, like:

- key documents and contract templates
- template email responses
- policies
- relevant marketing and branding copy
- your logo and branding assets
- best practices
- how-to videos

Don't forget that your operations manual should be customized to your collective. You can organize it in the way that makes the most sense and add your own personal touches. Consider making a video version of the manual. Keep information as bite-size as possible. Occasionally long descriptions and highly detailed instructions may be required. This is really an ongoing exercise and it should be updated regularly. Yes, it can be a tedious process, but I promise you'll thank me later for this one.

Goal completion date for this project:

Participant Welcome System

If you are a small collective, how do you handle a community of thousands? Have a crisp, clear system for onboarding new participants. Show them what they can expect now that they're in your tribe, how your church works and communicates, and ways they can participate more deeply.

Having a process for welcoming and supporting new participants is a fundamental necessity to help them feel cared for and totally loyal to the collective for the long term. Here's a few steps to consider in the onboarding process:

- The moment a new person walks through your virtual doors (website), start sending a sequence of messages that begin building a solid relationship. I called these messages touch-points. Touch-points can include text messages, social media direct messages, phone calls, and even house visits. If you run into them in the community, that's a touch-point. But the system is intended to manage and encourage intentional points of contact.
- Grab an email address during the first face-to-face encounter.
- What information do you need from new participants?
- Automate a series of emails so they run on their own like clockwork. MailChimp is a great tool for email marketing if you're not ready for a church management system yet.
- Make it easy. Walk participants through the steps to follow so they feel guided during the whole process.
- Make sure they know how to get support if they have questions.
- Check in often in the beginning to see if anyone has questions. Have a support team there to make sure everyone gets what they need.
- Be clear with new participants about how available you're going to be. This will help to establish healthy boundaries and avoid being overwhelmed.
- What boundaries do you want to set with participants? Will you answer emails in the evening or weekends? How long does it take for you to return a message? Are there any topics that are off-limits?
- How will your participants arrange a meeting with you? Contact the administrator? Your personal email? Text?
- Talk very openly about where they'll get support, so participants know exactly what to expect and what's expected of them.

Resources
How Welcome Do the Visitors at Your Church Really Feel?

The Right Accounting Process

Spreadsheets and budgeting might not be your idea of a good time, but I bet you'd appreciate the budgetary freedom to give to Week of Compassion or a local mission, right?

Let's do a quick test. True or false?

- We scan all receipts and organize them into categories.
- Our finance officers (the chosen participants who handle our income and expenses) use a tool like QuickBooks Online.
- We use accounting software to manage our expenses.
- Our finance officers generate and deliver key financial statements and reports each month.
- We are able to interpret and use our financial data to make smart decisions.

Were you able to answer true to any of these questions? If so, you are probably off to a good start. If not, gain control of your financial stability immediately.

Resources
Wave Accounting Software
Xero™ Accounting Software
inDinero – Accounting Software Plus Bookkeeping and Tax Services
Shoeboxed – Receipt Scanning and Expense Tracking

Building the pillars to a successful organization isn't always fun, but it's necessary. You created a name that resonates with your future and laid a bit of legal groundwork. You worked to familiarize yourself with systems that will save you time and Money, and you learned about the art of accounting. This ground work will pay off exponentially down the road. Your Church thanks you!

Money

Finances and Budgeting

During the ***Money*** section, you will:

- Feel empowered about your finances
- Challenge your mindset and systems around Money

Luke 14:28-30

For which of you, desiring to build a tower, does not first sit down and count the cost, whether he has enough to complete it? Otherwise, when he has laid a foundation and is not able to finish, all who see it begin to mock him, saying, 'This man began to build and was not able to finish.'

Do you know:

- how much income you generated last month
- the last time your finance team reviewed expenses, looking for discounts, increases, and money-saving opportunities
- how much you paid out in expenses
- how to read your financial statements to make decisions as a business (and, yes, your church is absolutely a business!)
- how involved you and your congregation feel you should be in knowing how much individuals contribute and in deciding how funds will be spent
- how your finance team is protecting funds against mismanagement

If you do, awesome! If not, I'm going to help you feel empowered when it comes to your Money. Balance sheets? Cash flow statements? Profit and loss? We're going to lift the curtain on all things related to finances in this section.

New Money Habits

Organize bills and bank statements as they come in because it can throw off your spiritual game to see a cluttered pile of bills and financial papers that you've been ignoring. It's very important to get into practice of consciously honoring and being grateful for your Money. If you're repaying debt, it's even important to have a gratitude practice around that.

Exercise:

Write a personal prayer about Money:

What stressful Money practices could you let go up? Write them down

Resources
5 Steps to Help You Master Church Payroll

Lifting the Financial Curtain

Your church needs systems in place for ingoing and outgoing Money.

For now, let's put all that anxiety around numbers and budget sheets aside and focus on the basics that every leader needs to know. Managing your core financial system means keeping diligent track of all of your invoices, expenses, receipts, statements and more.

> **Financial Statements** – records of your church's financial activities or the financial effects of doing business. They're a map that tells you where your Money came from, where it went, and where it is now.

You do not need your accountant to draw up an official set of financial statements each month anymore. Thanks to technology, your financial officers and your bookkeeping software can hook you up with all the reports you need:

- A profit and loss account (also known as an income statement) for the month that details each individual transaction
- A profit and loss account on a month-by-month basis
- A profit and loss account that compares your actual results for the month versus budget
- A balance sheet

Resources
How to Solve Your Church's Financial Crisis

Your Income Statement

> **Income Statement** – a document that tells you where your Money came from and where it went. According to *StartChurch.com*, this report contains all income and expense line items for the period, as well as the net income for the period.

You can look at income statements for specific periods of time – a week, a month, a quarter, or the whole year. At the top of your income statement you'll find your revenue, below that you'll find expenses. The literal bottom line is your net profit or loss sometimes called net income.

Just remember: revenue at the top, expenses in the middle, profit at the bottom. Expenses include things like office supplies, software, and contractor costs – costs required to run the church.

Here is a sample income statement:

St. Catherine of Siena Church

Income Statement - Summary With Budgets

For the Two Months Ending August 31, 2009

	Year to Date Actual	Year to Date Budget	Year to Date Variance
Operating Revenue			
Regular Collections	72,422.83	74,146.78	(1,723.95)
Auxiliary Receipts	75.51	150.00	(74.49)
Program Revenue & Other Income	185.74	650.00	(464.26)
Gifts/Donations-Wills/Bequests	61.00	60.00	1.00
Fundraising - Net	0.00	0.00	0.00
Interest & Dividend Income	34.77	34.00	0.77
Rental Income	1,590.00	1,590.00	0.00
Other Operating Revenue	4,981.25	4,600.00	381.25
Total Operating Revenue	**79,351.10**	**81,230.78**	**(1,879.68)**
Operating Expenses			
Salaries & Benefits	53,716.50	54,924.96	(1,208.46)
Property Insurance	1,527.70	1,546.70	(19.00)
Property Taxes	0.00	0.00	0.00
Other Program Expenses	913.74	970.00	(56.26)
Fees & Interest Exp.	606.69	606.69	0.00
Supplies/Expenses	6,518.77	6,446.34	72.43
Rectory Expenses	943.93	1,548.96	(605.03)
Building & Maintenance Exp.	8,507.26	8,612.17	(104.91)
Services/Outsourcing	2,665.62	2,646.62	19.00
Immaculate Conception School Assessment	0.00	0.00	0.00
Other Operating Expenses	4,132.82	3,666.47	466.35
Purchase Discounts-Operating	0.00	0.00	0.00
Donations/Gifts Other Entities	0.00	500.00	(500.00)
Total Operating Expenses	**79,533.03**	**81,468.91**	**(1,935.88)**
Net Operating Revenue (Loss)	**(181.93)**	**(238.13)**	**56.20**
Non-Operating Revenue			
Capital Fund Income	70,936.97	0.00	70,936.97
Parish Share - PIF Campaign	828.58	0.00	828.58
Total Non-Operating Revenue	**71,765.55**	**0.00**	**71,765.55**
Non-Operating Expenses			
Capital Expenditures	83,484.11	0.00	83,484.11
SSCF Parish Plans	200.00	0.00	200.00
Total Non-Operating Expenses	**83,684.11**	**0.00**	**83,684.11**
Net Non-Operating Revenue (Loss)	**(11,918.56)**	**0.00**	**(11,918.56)**
Total Net Revenue (Loss)	**(12,100.49)**	**(238.13)**	**(11,862.36)**

Image source: https://www.pinterest.com/pin/300193131382135152/

The Balance Sheet

Balance Sheet – a snapshot on a particular day of your business's assets (what it owns, its cash and inventory), liabilities (what you owe other people), and equity (what you are owed).

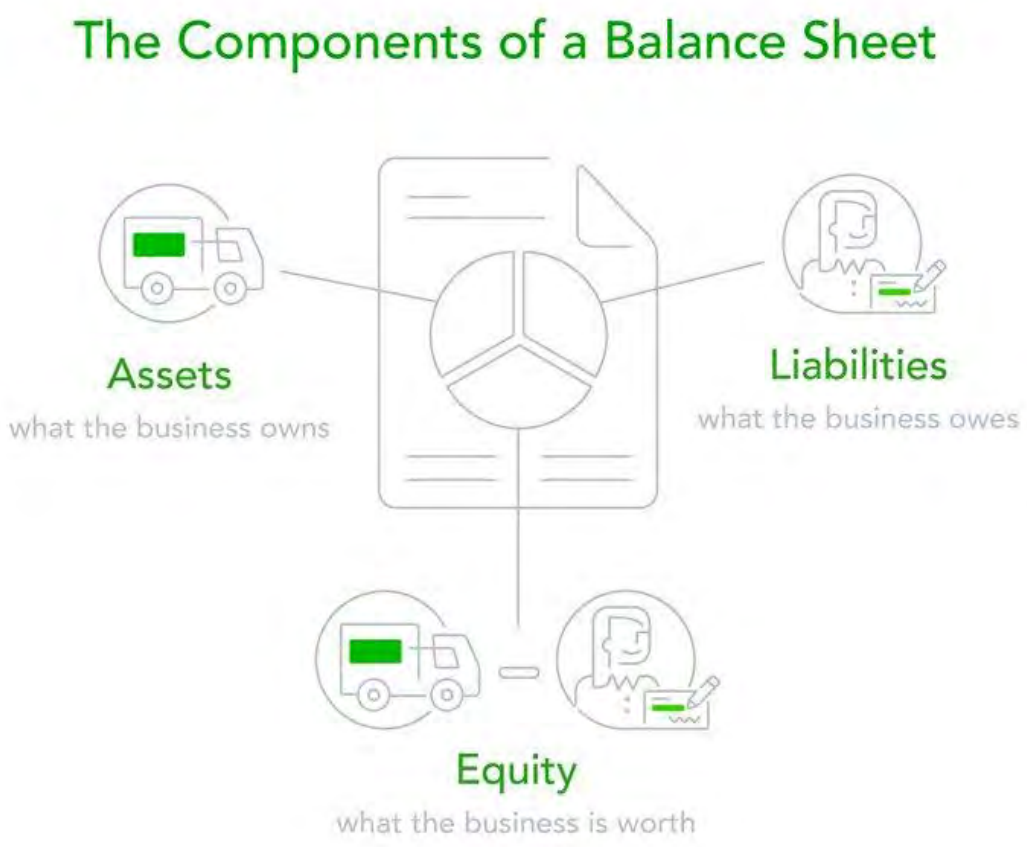


Image source: https://quickbooks.intuit.com/r/accounting-finance/small-business-owners-guide-balance-sheets-free-template/

Resources
The Business Owner's Guide to Balance Sheets
Analysis of Sample Balance Sheet of a Nonprofit Organization

Your Transactional Profit and Loss Account

Profit and Loss Account – an in-depth transaction sheet that is often provided by your bank as a bank statement

Regularly browse your profit and loss account to check for entries that:

- are missing
- you were not expecting
- look wrong
- are misclassified

A Month-by-Month Profit and Loss Account

Review the Money you're spending and consider why you're spending it. What are the results of spending that Money?

- How many people bought books from your bookstore?
- How many pastries did you sell in the cafe?
- How much did you spend hosting that workshop? How much Money did you make?
- How much are you paying your team (musicians, administrator, etc.)?
- How many people signed up for your newsletter because of Facebook ads?

This spending should have a purpose that can be measured. It's less scary to spend Money when you know where it's going and how it will positively affect your collective.

Budget Versus Actual

Now let's compare your budget to what actually happened. How much income did you actually generate compared to what you expected? And how much did you spend versus what you actually budget it?

Examine those unexpected moments when your budget veered from its expected path.

- **Good differences** when you unexpectedly collected more Money
- **Bad differences** will you collected less than expected
- **Timing differences** when you thought you'd receive more on a certain date and you weren't

Resources

6 Simple Ways to Create a Church Budget

Back to the Balance Sheet

Confirm that your bank, credit card, and online giving balances match up with your statements. If they don't, find out why and correct the differences.

Resources

The Do's and Don'ts of Counting Church Money

Resources

Missional Ways to Use Your Money
How to Finance Your Church Plant
Funding Your Strategic Plan
How to Plant a Church Without Going Broke

Missional-Minded Money

Exercise: Think about how much Money you'd like to giveaway twelve years from now. Fill out the blank check and save it as a reminder and motivator for your God-size dream to change the world.

Messaging

Marketing

During the ***Messaging*** section, you will:

- Create compelling content
- Craft your cover story
- Advance marketing clarity

> ***Marketing*** *– sharing the story or Messaging behind your collective and telling your community about your Movement and why they should get involved*

I'm going to help you create a blueprint for your website, develop compelling ***copy*** and sound bites, get testimonials from your participants, and feel more confident about Messaging than ever before. Even better? I'll teach you how to do all that while still being true to your Christian ethics.

> ***Copy*** *– the text of a marketing or advertising Messaging*

Give, Give, Give

Proverbs 18:16
A gift opens the way and ushers the giver into the presence of the great.

Exercise:
WHAT I WANT: MORE TRAFFIC
Three ways I can be generous and send traffic to other people:

WHAT I WANT: MORE FOLLOWERS
Three ways I can be generous with my social media friends and followers that will reward them for engagement:

WHAT I WANT: MORE PARTICIPANTS
Three ways I can be generous that will lead to more participants:

Participants as Your Storytellers and Ambassadors

> ***Ambassador*** *– participants enlisted to represent and express the Messaging in a positive light and, by doing so, help to increase awareness and participants.*

Exercise: List your collective's top three most influential ambassadors. How can you empower or equip each of them (according to who they are) to be bolder, more intentional storytellers?

Ambassador 1:

Method of empowerment:

Equipping tools:

Ambassador 2:

Method of empowerment:

Equipping tools:

Ambassador 3:

Method of empowerment:

Equipping tools:

Create a Year of Content in One Day

> ***Content*** *- a compilation of information, ideas, and messages that are translated into some kind of written, visual, or audible format for others to consume. (toprankblog.com)*

John 3:16
For God so loved the world that He GAVE…

Believe it or not, it's possible to create as much as 50 pieces of content in one day, pretty much a whole year of content. And that brings me to your next mission.

Exercise: Below is the process for filling up your content calendar, and creating loads of valuable content in one sitting, and it's your next mission.

1. Visit your Facebook page or revisit previous email comments to crowd-source questions, comments, pain points, challenges, and suggestions from your audience or participants. What questions do they ask that you have an answer to? List six.

2. Organize this feedback into three categories. I've found that reading through my audience's feedback really gets my ideas flowing, too.

Question/Comment:					
Talking Points:					

3. Now go through and write a few talking points that you will use to answer each question in the list.
4. Next, turn you cell phone's camera on selfie mode and record yourself answering the questions. You can also hire a videographer if you want to go a step above, but we all start somewhere.
5. Go through question by question and make sure you hit on the key talking points you wanted to share.
6. When you're done recording, you or an editor can edit the individual videos and there you go; you have videos ready to go.

Homework: Follow a similar process to create written content. Matter of fact, you can send the recordings off to be transcribed. You can find transcribers at the ready on Upwork and when the transcript comes back you just have to edit your responses to finalize your written content.

Schedule the release dates for all the content you created. This is your content calendar. Create email blasts, social media updates, graphics and ***memes*** for your content. Consider yourself ahead of the game now.

Meme *- a humorous image, video, piece of text, etc. that is copied (often with slight variations) and spread rapidly by Internet users. (brandwatch.com)*

Your Cover Story

There is a key difference between sounding conceited and calmly, confidently letting people know where your strength lies and how you're changing the world with your collective.

Hotelwork: To navigate the difference between confidence and conceited, we're going to pretend a bit. Let's pull out our imaginary press pass and write a feature story about you and your collective for an imaginary publication. But, you're not writing the article as yourself. Instead, imagine you're a third-party interviewing you about your ministry; imagine this piece is for an audience who has never heard of you or what you do.

The key here is to captivate and wow them while describing your Messaging in the simplest, most engaging way possible. Tall order? Yes. But I know you're up to it. Write all about it:

Messaging Board

Even Jesus' followers had to work out Jesus' BRAND.

Matthew 16:13-16

Jesus asked his disciples, "Who do people say that the Son of Man is?" And they said, "Some say John the Baptist, but others Elijah, and still others Jeremiah or one of the prophets." He said to them, "But who do you say that I am?" Simon Peter answered, "You are the Messiah, the Son of the living God."

If you're not quite sure which direction you like to take your ***brand***, a Messaging Board can help you gain serious clarity about the overall tone and visual vibe of your collective.

Brand

- A name, term, design, symbol, or any other feature that identifies one service as distinct.

- Intangible elements related to its specific promise, personality, and positioning and tangible components having identifiable representation including logos, graphics, colors and sounds.

– The essence of one's own unique story. (heidicohen.com)

The Messaging Board includes your logo, color scheme, patterns, and images that feel like your brand; along with the best shots from your photo shoot and more. It will help you make sure every choice made – the copy, the headshots, the social media icons – work together to create an online space your audience and you love.

Double-check every choice you make against the board so you stay on track and stay true to your vision.

Homework: If you're building your brand from scratch or you're shooting for a rebrand, this exercise may take a little longer than if you already have a strong sense of your brand. Be patient with yourself, but stay focused on how you want your work to look and feel out there in the visual realm.

You can also give this Messaging Board to your designer as a starting point for gorgeous graphics and a website you love. Ready to get started? Have a dig through magazines and flyers and pull images and font choices that you like, or even turns of phrase you enjoy. Don't worry too much or analyze if something works with your brand – if it speaks to you, rip it out.

Once you've gathered inspiration, snap a photo of your Messaging Board so you can send it to a designer. While you're at it, share it with me on the Hope Partnership Facebook page.

Of course, if you're more of an online person, Pinterest is a great place to build a digital Messaging Board.

Resources
The Three Ingredients Of A Successful Nonprofit Rebranding

Your Website Blueprint

Homework: Complete the blueprint below and then book some time with your web developer to ensure this blueprint is built into your digital home.

How do people get to your website? Social media, advertising, search engine results, directly from the URL you share?

What action do you ask visits to take when they arrive at your website? Attend a Program, volunteer for a Project, book an appointment with the pastor?

How do you nurture interested participants through your website? Free resources, valuable content, free sermon downloads, social media, events?

How do you elegantly impact visitors? Vision video, beliefs page, copy that connects to the hearts of your potential participants?

Does your website have:

- A homepage description that tells visitors who you are and what you do
- Calls to action that let your visitors know what they should do next
- Mobile ***responsive design***
- Your contact information
- A map and directions if you have a physical location
- Service times
- An opt-in offer for capturing email addresses
- Web analytics tools, like ***Google Analytics***, to track key data about your traffic and conversion rates

> ***Responsive Design*** *allows your website to adapt to the device your users are viewing it on. (responsivedesign.is)*
>
> ***Google Analytics*** *is a freemium web analytics service offered by Google that tracks and reports website traffic.*

Messaging Clarity Microscope

Want to develop your brand and overall Messaging to use on your website and marketing materials? This exercise will help you do just that, in two condensed steps.

This is, at its core, a self-interview experience. You'll answer some insightful, thought-provoking questions, record your responses, and take notes on how these answers resonate with you and reflect your goals. Let's dig in!

You'll need:

- Something to record with (your laptop or smartphone probably has a program/app for this already).
- A timer set for ten minutes

Exercise:

Part 1: Hit "Record"

Spend ten minutes answering the following questions with as much or as little information as feels right. Let yourself speak freely and get passionate and fired up if that's how you really feel!

Be as specific as possible. If you hear yourself speaking in vague, blanket terms ("I want to help people be happier"; "I want my collective to make disciples") go deeper ("I want to help people discover the joy of the Lord through a share passion for photography").

1. What road got you to where you are now? Where did you beginning? What does your present look like? What's ahead for you?
2. Who exactly are you called to serve? What's your perspective participant struggling with on the surface? On a deeper, more subconscious level, where are they struggling?
3. Why do you love your ministry? Why do you find this ministry inspiring?
4. How will your ministry change the lives of your participants? How will these changes affect them next week, next month, next year... even 20 years from now?
5. List the objectives you like to see at the end of this sentence: When people visit my collect, they feel _____.

For example, here's how you'd answer this question: "When people visit my collective, they feel inspired, more knowledgeable about God, ready to share their testimony, more grounded in their life's purpose."

Part 2: It's Note Taking Time

Now, play back the recording and jot down the best, most interesting bits:

Here are a few very specific things I want you to listen for:

- Phrases you hear yourself emphasizing or saying over and over again (for example, "I believe in ____" or "We are all about ____"). These are hidden one-liners you can make spicier with extra creative words or use as is. Either way they can be put to work everywhere.
- The objectives you can use to describe your collective and how you feel about it. These, or some jazzy of synonyms, can become your signature buzzwords.
- How you talk about your participants real needs. Have you ever experienced those needs yourself? Is their story your story too?
- The L Factor: What do you hear yourself saying you love?
- The missional-oriented stories you hear yourself telling about your participants, your big vision, and so on.
- Where you seem to hesitate or feel a little lost. Could this be a gap in your Messaging understanding? After you finish this exercise, take some time to really figure out what's missing and what you may need to explore further.

Congratulations! You've successfully conducted a fabulous, professional-level interview and unearthed some incredibly valuable insights.

Resources

7 Easy Questions That Will Tell You If Your Content Marketing Is Working

Merger

Team Building

During the ***Merger*** section, you will:

- Find the right help
- Decide with whom you need to join forces
- Develop insights and ideas to build a dream team

Merger – *the coming together and collaboration of participants, thus forming a team to achieve the same goal.*

Mark 6:7
Calling the Twelve to him, he began to send them out two by two
and gave them authority over impure spirits.

Compatibility

When you're starting your search for a new ministry partners – whether it's an associate minister or a new Merger member – it's so, so easy to fall into the trap of hiring or partnering with someone just like you.

Romans 12:6
We have different gifts, according to the grace given to each of us.
If your gift is prophesying, then prophesy in accordance with your faith;

Exercise: Now, write down your strengths based on your own experiences and good feedback you have gotten.

My strengths are:

My challenges are:

Time Audit

When deciding what type of players to add to your Merger, start with one big question: what am I spending the most time on that isn't producing or nurturing participants? …that doesn't have missional impact?

When I started out, I did everything myself. Every tweet, every edit, and every email – I dealt with them all. After a while, of course, it got to be too much. So what did I handoff first? Bookkeeping and accounting. While I know enough to make it work, receipts and tax deductions just aren't my areas of brilliance, and there comes a point when the pastor needs less easy access to the money.

Why did I choose bookkeeping and accounting instead of, say, virtual assistant work (scheduling social media, updating my website, and posting YouTube videos)?

And the answer is weekly audits. Time audits, that is.

Here's how it works: over seven days, track what you spend the most of time on. It's a great way to get a clear picture of what you are pouring your energy into – and you might be floored by how many hours you spend on things that aren't directly related to your Messaging or participants.

Homework: This exercise is designed to help you figure out what tasks can be outsourced and where you want to center more of your attention.

Next week, I want you to track your time. You might be amazed at how much time you really, spend futzing around on social media or responding to emails. There are two ways you can track your time: you can go old school or digital.

Old school – set an alarm to ring every hour on the hour from 8 a.m. to 5 p.m. or whenever you allot undivided attention to your collective. Each time that bell rings, write down what you've been working on.

Digital – go to toggl.com and download their free time-tracking tool. Add the plugin into your toolbar and when you finish a task, toggle will even give you a pie chart of how you're spending your time.

Either of these methods will give you a better picture of where you should spend time and what you might want to look into tasking out or handing over to your existing Merger.

After the week is up, review each of the tasks you found yourself tracking and answer the following questions:

- What can you delegate?
- What do you want to spend more time on?
- What do you want to spend less time on?
- What can you delegate to your existing Merger?

Resources
Seven Traits of the Excellent Ministry Assistant

Sustainability Stimulators on Making a Merger

1. Build a multidisciplinary Merger – cover a wider range of tasks
2. Bring more viewpoints to the table – the Merger will generate more options
3. Find the unusual suspects – look for different experiences, skills, knowledge, and viewpoints
4. Eye an idealist – spot that high-energy up-and-comer, or some young with interesting ideas
5. Roles, not titles, are critical – Merger members will better understand how and where they can contribute
6. Don't forget your literal thinkers, mavericks, rebels, hackers, developers and designers

Crafting Your Perfect Job Description

Ready to write your job description? **Here are six rules to follow:**

Rule 1: Your description shouldn't be stiff and dry if your collective isn't. The best job descriptions will match your brand voice and appeal to the type of person you're trying to attract.

Rule 2: Talk a little bit about who you are as an organization, what you're looking for, and exactly what you need. Because you should be clear about the kind of person who would be a great fit for your collective, talk about your dream dynamics now, including the tools you use to communicate.

Rule 3: Weave a few critical details into the application process to reveal who read the whole posting and who just skimmed it.

For example, at the bottom of the job description, add this: please include a letter telling me about your strengths and why you feel you to be a great fit for the Merger. At the start of the letter, open with a simple "Dear Pastor Toni"; and in the last line, tell me one crazy, interesting fun fact about you!

Doing this will allow you to see how well they follow directions and pay attention to detail.

Rule 4: Could this position lead to the possibility of more hours or responsibilities? Make sure you include that! It's so important that a new hire knows exactly where they fit in the puzzle of your collective.

Rule 5: Be clear about the level of help you need. Do you want one person who can work with you exclusively? Or are you comfortable with being one of several churches with which they work?

Whether you have strict expectations for a number of hours spent working on projects indent lines, or you're more flexible, remember: how people want to work is equally as important as the stuff they want to work on.

Rule 6: If the applicant is a creative type, ask for references as well as a portfolio or video of their work. And follow up with those references! Doing so can save you a whole bunch of time and stress.

So without further ado, let's put those rules to work.

Hotelwork: Fill out each of the following sections, and when you're ready, string them together to create your perfect job description:

Part 1: Provide a short description of your collective, what you do and who you're looking for.

Part 2: Describe the way you want this hire to work and your expectations for them.

Part 3: Include technology or tools they need to be proficient in, for instance Excel or an organ. Is there a particular skill-set they must have? Make sure you spell it out.

Part 4: Think of a fun little task you want to give to prospective hires, so you can figure out with a quick glance who read the full job description.

Resources
How Much Should Churches Spend on Their Staff?

Holding Your Perfect Interview

Here are the go-to questions to ask. These questions will help you get a clear picture of the person with which you're speaking, their vibe and desires, and whether they resonate with the position you're discussing. Feel free to use these and then add your own collective specific questions at the bottom.

Main Merger Interview Questions

1. What's your definition of success?
2. How do you like to work? Do you enjoy working on multiple things at once or focusing on one task to its completion? How much structure do you like?
3. Describe something that brings you immense joy. Tell me about someone who brings your immense joy.
4. In any given week, what are you working on when you stop, smile, and think; wow this is awesome!?
5. Outside of church, what do you love to do? Where can I find you on, say, a Saturday night?
6. What would you say your zone of genius is?
7. What are your strengths and weaknesses?
8. What attracted you to this position?
9. What's a project you've done recently that you're crazy proud of?
10. Do you have a job now? What do you like most about it? Is there some way you feel you could be contributing a bit more but haven't had the chance?

Exercise: Add four more questions that directly align with your collective's vision:

Operation: New Hire

Growing the Merger is something that most church planters put off for too long. Developing a Merger is about find someone else to do those things *almost* as well as you can. And in this situation almost is good enough.

If you're still not sure what to delegate, here's a great rule of thumb: if someone can do it 70% well as you, outsource that task.

Resources
So, You're Ready to Hire Staff at Your New Church . . . You Sure???
The Second Staff Person a Church should Hire
Five Things to Consider When Making Your First Staff Hire

How to Staff Churches Under 600
2 Hidden Costs of Hiring Church Plant Staff

Board of Advisers Meditation

When you find yourself in uncomfortable situations, use your Board of Advisors Meditation (often referred to accountability partners). It's a simple, loving way to examine all sides of a situation and step into a different mental space.

Exercise: List your board of advisors

Homework: Examine your mindset after the meditation. Are you seeing the situation any differently? Journal about it.

After you come out of the meditation and navigate the challenge you're facing, continue to embody that person's energy. While it may feel like you're playing a part at first, with a little patience, you'll actually train yourself to embody that strength mindset each time you encounter a challenge. And really, the gifts, qualities, and light you value in others are a reflection of you.

Recourses

Shepherding Ministry Venue: Ministry Teams
Our Best on the Teamwork of Ministry
Five Teams to Build As You Plant Your Church
What Is the Difference Between a Committee and a Team
4 Ways to Build Teams That Pull You into the Future

Mission

Missional Planning

During the ***Mission*** section, you will:

- Make a bigger picture plan
- Set big, missional goals and achieve them
- Set strategy and actionable tactics

Resources

The Difference between a Church's Mission and a Church's Vision

I believe in soul-stirring meditations and tough love pep talks, vision boards and action plans. While most strategic plans are avoid of all creativity, we are going to take a more heart-centered, visual, and fun approach to setting big goals and achieving them.

If you're an inventive church leader, I doubt your heart is stirred by spreadsheets and bullet points. Thankfully, it's totally, totally possible to create actionable plans, steps, and strategies for your collective in a way that resonates with you.

Your Blissful Budget

Homework: Sounds like an oxymoron, huh? Well, I hope at this point, a "blissful budget" feels possible because you have a better understanding of how to read financial statements. For your next mission, I want you to accessing your budget for the next twelve months. If you don't already have one, you can start one by doing a brain dump of all the expenses you have, list them in the space below.

When you're finished, it's time to create your budget in the way that feels most blissful to you. If that's in an Excel spreadsheet, great. You can download a budget worksheet of your choice online. If you'd rather use an online tool like Mint, go for it. If you'd rather have an accountant create your budget, give him or her a call. And if you're more likely to stick to a budget if it's written on paper, feel free to do that too. I believe in running your collective and managing your Money and whatever [legal] way feels best for you. What works for some of us doesn't work for others.

Your Bigger Picture Plan

Sometimes the big goals can be overwhelming. They seem far away and out of reach but they need to be big so that you are striving toward achieving greatness.

Ken Hensley
I know why I am here and my only real focused goal is to live each day to the fullest and to try and honor God and be an encouragement to others. What the future holds is firmly in God's hands, and I am very happy about that!

- Drawing out five big goals for the year based on your idea future and active passions.
- Once you have your five big goals, start strategic actions and set milestones for each goal. Here are some example goals from SmartChurchManagement.com:

1. Increase weekly church volunteer participation by 10% (100 to 110) by December 20xx.
2. Reduce operating budget expenses by 10% ($100,000 to $90,000) by June 20xx.
3. Increase weekly attendance 20% (500 to 600) by December 20xx.
4. Establish volunteer leadership training and train 75% of volunteers by October 20xx.

Let's look at strategic milestones and actions for the first example – increase volunteers:

Volunteer Department Annual Goals				
Goal	Steps	Responsibility	Due Date	Status
Increase volunteer participation by 10% - (100-110) by December 31, 20XX.	Research what percentage of core members are actively volunteering.	Kathy Thompson	May 12	Completed
	Develop volunteer recruitment campaign.	Dan Smith	June 1	Completed
	Organize volunteer fair.	Stacy Jones	July 1	Pending
	Process new volunteers.	Stacy Jones	September 1	Pending
	Assign new volunteers.	Stacy Jones	October 1	Pending
	Schedule new volunteers.	Stacy Jones	November 15	Pending
	Compare total volunteer numbers to original total.	Kathy Thompson	December 15	Pending

- From here, create a checklist to stay on track.
- Let your strategic actions determine your week-to-week schedule and activities.

Now let's move on to creating your Bigger Picture plan. This is a key component to sustainability, so spend some time on this section.

Hotelwork: In the next exercise, you'll outline five big picture goals you want to accomplish with your collective over the next twelve months. The only rule is for at least one of your goals to be financially related. For example, a capital campaign towards a specific project or a monetized social enterprise venture with a revenue goal attached to it.

For each goal, list five milestones to achieve, with completion dates to keep you on track. Include three actionable items with each milestone.

Think:

- What will be different because I realized the goal?
- How will we feel knowing we accomplished something so important to God?
- Whose lives have been impacted because we pursued the dream?

Bigger Picture Goal 1:		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		

Saved for next year:

Bigger Picture Goal 1:		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		

Saved for next year:

Bigger Picture Goal 2:		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		

Saved for next year:

Bigger Picture Goal 3:		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		

Saved for next year:

Bigger Picture Goal 4:		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		

Saved for next year:

Bigger Picture Goal 5:		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		
Strategic Milestone		Completion Date
Action	Action	Action
Missional Markers		

Saved for next year:

Homework: Create a vision board for each bigger picture goal. Feel free to cut out images or words from magazines or print photos you find online that will help you visualize your life once that go is realized.

5x5 Plan

Once I've determined the five Big Milestones for each of my five Big Picture goals, I sum it all up in a one-page 5x5 Plan. You're 5x5 Plan is simply the five milestones for each goal, for a total of twenty-five milestones for a 12 month period. That means, in any given year, you'll be working on twenty-five major things.

GOALS

Missional Markers

Ephesians 1:9-10
He thought of everything, provided for everything we could possibly need, letting us in on the plans he took such delight in making. He set it all out before us in Christ, a long-range plan in which everything would be brought together and summed up in him, everything in deepest heaven, everything on planet earth.

Participation

- The collective expects its regular participants to be involved in ministry to the community.
- The collective supports its participants with training, prayer and coaching.
- People spend very little time on institutional maintenance at the church.
- People take responsibility for their spiritual growth.
- Change is expected in the collective.

Leadership

- Job descriptions for both lay and pastoral leaders are fluid and determined based on missional priorities from year to year.
- The collective provides (or sponsors) leadership training to people in and outside the church, for the sake of community transformation.
- Less than 25% of the pastor's time is spent on strictly "church" activities.
- Intentional and regular holistic (mind, body, soul, spirit) care is provided for leadership.

Finances

- Each year's budget is based not on the prior year's budget, but on the mission priorities for the coming year.
- There is flexibility in budgeting, which allows for quick changes and frequent adaptation.
- Donors are regularly thanked and shown the fruits of their gifts.

Community

- The interaction between people in the collective and the community is high.
- Neighbors around the collective considered this to be their "home church" even though they don't attend regularly.
- People from the collective intentionally go into the neighborhood to build relationships and begin new ministries.

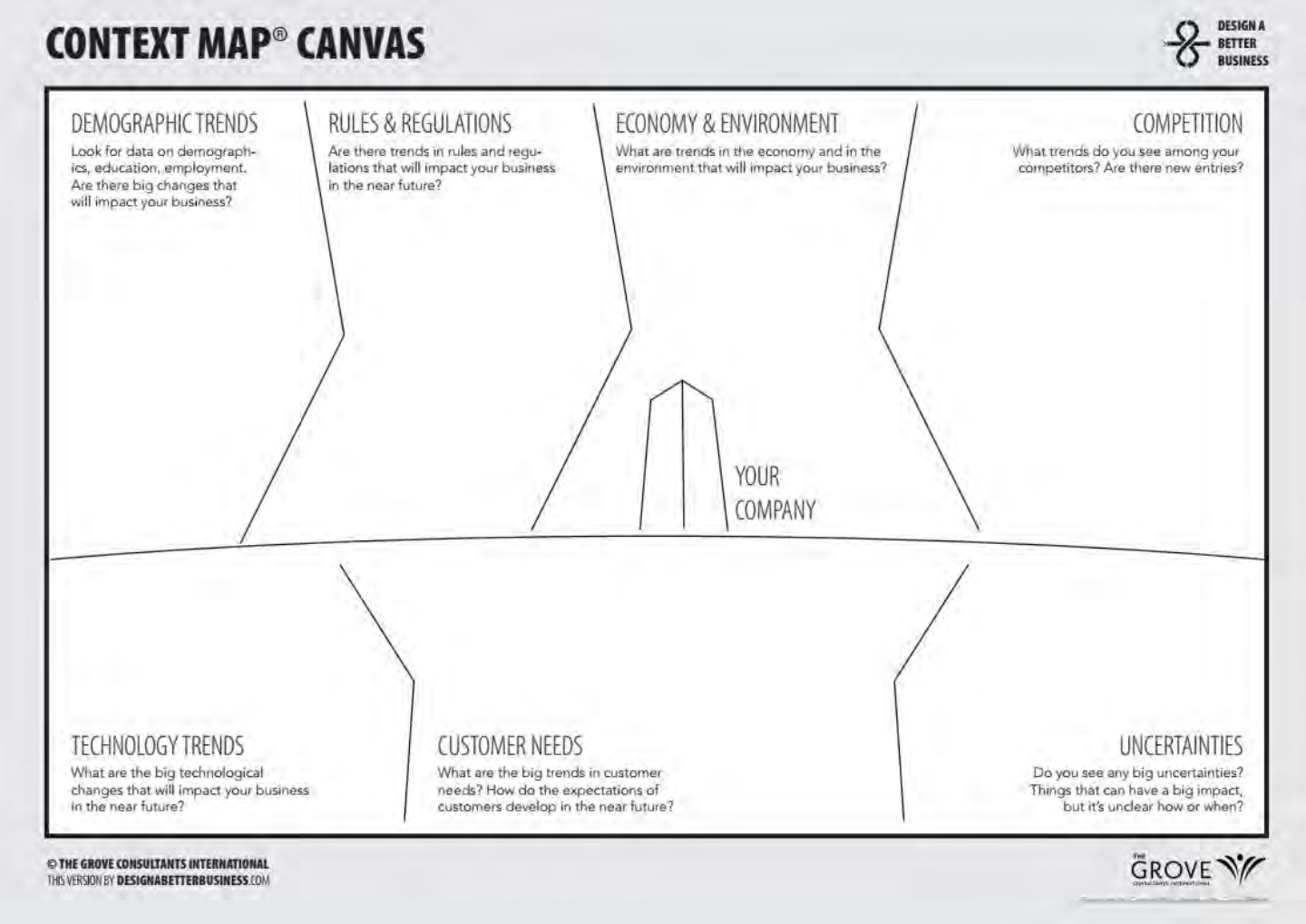
Platform

- If the collective owns or rents a building, they view its facility users as partners in ministry, going "over and above" with hospitality (hanging signage cleaning rooms offering food).
- The collective gets to know the people who use the facility and regularly praise for the many people who use the building.

Exercise: Go back and add Missional Markers to each of your Strategic Milestones.

Sustainability Stimulators on Context

1. Map out the trends with your Merger, and share different perspectives
2. Converse with drivers outside your own collective about forces that (could) shape your ministry now and in the future
3. Look for data on the demographics, education level, employment situation of potential participants
4. Think about policies, rules, and regulations that affect your context
5. Economic and climate trends will impact your collective too
6. new technological trends can impact your collective
7. Use the Context Canvas® to help you understand the collective's context



Metrics

Meaningful Measurements and Markers

During the ***Metrics*** section, you will:

- Set up markers to make wiser decisions
- Focus on targeted outcomes

> ***Measure*** *is a number that is derived from taking a measurement*
>
> ***Metric*** *is a calculation between two measures*

Motivation Metrics

Numerous studies have shown that ***intrinsic motivators***, such as peer recognition, a feeling of mastery or purpose and potential, are far more effective than tangible, extrinsic rewards, such as money, for a job well done.

> ***Intrinsic Motivation*** *is when one is motivated by internal factors, as opposed to the external drivers of extrinsic motivation.*
>
> ***Intrinsic Motivation*** *drives you to do things just for the joy of it, or because you believe it is a good or right thing to do.*

Measuring intrinsic motivation allows you to gain a fuller perspective into all of the areas participants are performing in—not just ***BIP***

> ***BIP*** *– common measurements of traditional, modern church "success" such as Butts in Pews or Bucks in Plates*

Here are three reasons why measuring Motivation matters:

1. To gain genuine benchmarking and feedback.
2. To track how engagement in one area influences performance in another.
3. To identify effective ways to improve.

Once you begin measuring these intrinsic factors, it becomes more feasible to build an effective long-term performance strategy based on these insights. Here's how:

1. Establish a baseline. Where do your participants, activities and efforts stand when it comes to motivation? Do an initial survey to assess engagement levels, participation, interaction, etc. Doing so will help you to determine where you are right now so that you will have a comparison to where you would like to be.
2. Form a hypothesis based on what you believe may provide intrinsic motivators for your Merger based on the baseline measurement.
3. Implement tactics designed to drive desired behaviors: social media mention for project participation, peer recognition for completing training modules, rewards for engagement on the collaboration platform, etc. Methodically test and motivate behaviors that support your hypothesis.
4. As with any experiment, you will then measure, compare to baseline, adjust tactics and repeat. It becomes an iterative process that enables you to fine-tune your tactics based on empirical results—once you start measuring what matters.[Adapted from hrps.org]

Movement Metrics

Measuring the success of a Project or Program is a valuable practice. It provides a learning opportunity for future undertakings and the opportunity to assess the true effectiveness of the Movement. In order to have a holistic view, objective and subjective criteria need to be considered.

1. **Scope** – This is the intended result of a project and what is required to bring it to completion. To get a real measure of your project's success you want to determine if it achieved its objectives within the given framework.
2. **Schedule** – This is easy enough to measure and understand. Were you able to hit your milestones on time? Did your project get delivered on time? And if not, how far behind schedule was it?
3. **Budget** – Did you manage to deliver your program within budget? Was it over or under? And if so, by how much? I'm sure it comes as no surprise that your ability to deliver your program within budget is usually considered one of the greatest indicators of success.
4. **Team Satisfaction** – This is more subjective in nature and is often overlooked when evaluating project success. But I beg to say that team satisfaction should be at the top of your success criteria. They're the ones who were deep in the trenches, and they'll be the ones by your side on the next project adventure too.
5. **Community Satisfaction** – Along with your team, you also want to get the feedback of your external participants. Are they content with the results? Were their needs met? Find a way to track community satisfaction through the project life cycle all the way to delivery.
6. **Quality** – The point isn't only to deliver the intended work but also, to exceed expectations. It's important to track quality and make adjustments where necessary. Even after the project is delivered, quality assurance is often an ongoing piece of the project puzzle.

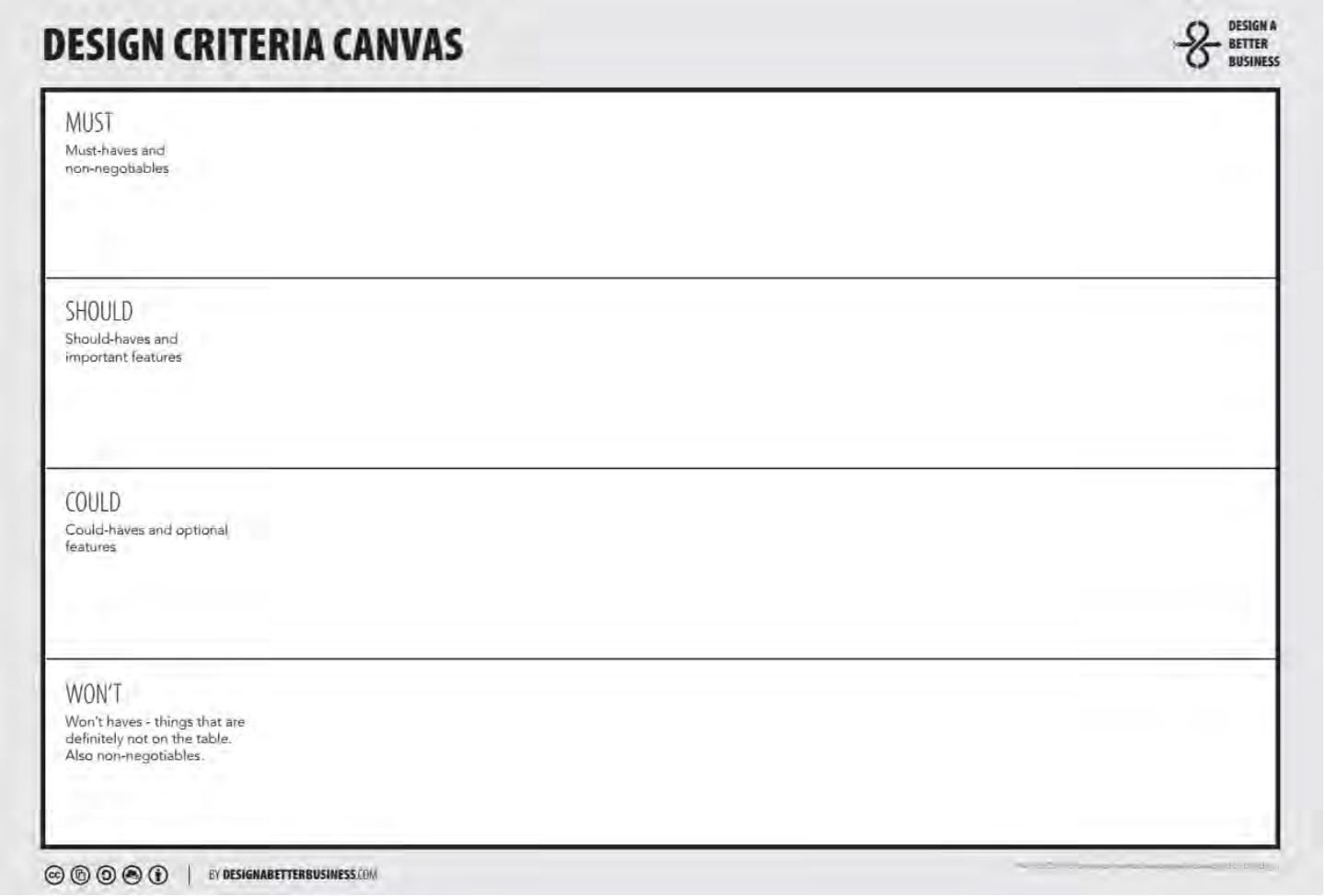
Ultimately, you want to evaluate if the project or program hit its target and how smooth the delivery was. [Adapted from valuestreamguru.com]

Resources

10 Performance Metrics Examples Project Managers Can't Afford to Miss
How to Manage Projects Like An Actual Project Manager

Sustainability Stimulators on Criteria

1. Implement criteria to make it easy to determine if you are on the right track
2. Don't negate your non-negotiables
3. To discover important elements use the "MoSCoW" method: categorize every element under "Must," "Should," "Could," or "Won't." This will help you prioritize.
4. Afterwards, be prepared to readjust to match a new direction.



Messaging Metrics

H. James Harrington
Measurement is the first step that leads to control and, eventually, to improvement.

Messaging Metrics provide deep insights into how our content is performing. They tell us how many people are consuming our content, what they are doing with it, and whether or not they like it. Metrics alert us to which ideas we should replicate and which we should look to improve.

Working your Website

Start by gathering some data from your collective's website:

1. **Unique visitors:** The best indication of your site's overall traffic, unique visitors refers to the number of individuals who visit your website during a given period of time, where each visitor is only counted once.
2. **Page views:** The cumulative number of individual pages that your visitors click on during a given period of time. If your page views are higher than your unique visitors, that may be an indication that your audience is finding your content engaging because individuals are clicking around to multiple pages.
3. **Search engine traffic:** The amount of traffic being referred to your site through search engines, such as Google or Bing. This number will give you a clear indication of how effective of a job you are doing at optimizing your content for search.
4. **Bounce rate:** The percentage of visitors who come to your site and then immediately "bounce" or leave before clicking on any other pages. A bounce rate of less than 40 percent is considered good. If it is any higher, it may be an indication that visitors to your site don't like what they find there.
5. **Conversion rate:** The percentage of visitors to your site who take a specific action that your content encourages them to, such as signing up for your newsletter. Conversion rates vary considerably based on industry, but tend to hover around 2 and 3 percent on average. That said, aim for a conversion rate of approximately 5 percent, or even higher if you are creating specific landing pages for specific audiences.
6. **Inbound links:** The number of external links to your site, an indication that other people have found your content important enough to link to it. Importantly, the more high-quality inbound links you have, the higher your content will rank on search engines.

One of the best ways to track all of this information is by setting up a free account with Google Analytics. A powerful tool, Google Analytics will allow you to monitor your website(s). That way you can find out how specific pieces of content are performing, as well as the overall performance of your content Messaging efforts.

To make things even easier, Google Analytics also gives you the option to compile and download reports that will give you a snapshot view of the information you need.

Recourses
5 Google Analytics Tools for the Mission of the Church
How Churches Can Use Google Analytics Effectively
50 Metrics to Measure Your Content Marketing Campaign

In addition to the basic Metrics noted above, there are two other important things to take note of: the number of comments and the number of shares your content gets — both are strong indicators of engagement. Any time that people are taking the time to post a comment about your content or to share it with others, it's a great sign.

[Adapted from contentmarketinginstitute.com]

Keep an Eye on your KPI

Churches often lack real visibility into their operations—and visibility is vital. If an organization wants to understand if they are meeting their mission, they need to see real-time data. A monthly financial report is not visibility. Real-time data should be based on the ***Key Performance Indicators (KPIs)*** that are important to understanding the success of your collective reaching its goals.

> ***Key performance indicators****, also known as KPI, help gauge the effectiveness of various functions and processes important to achieving organizational goals.*

You want to be sure your efforts meet the following targets:

- Remain financially viable
- Benefit the participants and community you are serving
- Contribute to your ability to achieve goals necessary to achieving your overall mission.

Here are some recommended KPIs for Money:

- Actual to budget variance
  - Consolidated for the organization as a whole
  - For each program and project
- Cash basis summaries
  - Cash balances in the bank
  - Cash balances by programs, additional streams of income, etc.
- Accounts Payable and Accounts Receivable balances

[Adapted from jmtconsulting.com]

What KPI?

Homework: Develop KPI for each of the **M&Ms of Missional and Sustainable Ministry Planning**. Make them specific to collective.

To help you with your homework, let's make sure we have a full understanding of Key Performance Indicators. **In its simplest form,** ***a KPI is a type of performance measurement that helps you understand how your organization or department is performing.*** A good KPI should act as a compass, helping you and your team understand whether you're taking the right path toward your strategic goals. To be effective, a KPI must:

- Be well-defined and quantifiable.
- Be communicated throughout your collective and ministries.
- Be crucial to achieving your goal. (Hence, key performance indicators.)

The trouble is, there are thousands of KPIs to choose from. If you choose the wrong one, then you are measuring something that doesn't align with your goals. *How, then, should you go about selecting the right KPIs for your organization?* Here are few more to consider:

Money Metrics

1. **Income**: This goes without saying, but it is still important to note, as this is one of the most important performance indicators out there. Don't forget to analyze both gross and net profit margin to better understand how successful your collective is at financial sustainability.
2. **Cost**: Measure cost effectiveness and find the best ways to reduce and manage your costs.
3. **Line of Business Revenue vs. Target**: This is a comparison between your actual revenue and your projected revenue. Charting and analyzing the discrepancies between these two numbers will help you identify how your collective is functioning during certain seasons.
4. **Line of Business Expenses Vs. Budget**: Compare your actual overhead with your forecasted budget. Understanding where you deviated from your plan can help you create a more effective departmental budget in the future.

Participant Metrics

5. **Participant Lifetime Value (CLV)**: PLV helps you look at the value your collective is getting from a long-term relationship with your regular attendees, members, volunteers and supporters. Use this performance indicator to narrow down which channel helps you gain invested participants.

6. **Participant Satisfaction & Retention**: On the surface, this is simple: Make the people happy and they will continue attending and supporting your collective. What about your church gives the participants deep meaning and joy?
7. **Net Promoter Score (NPS)**: Finding out your NPS is one of the best ways to indicate long-term growth. To determine your NPS score, send out quarterly surveys to your participants to see how likely it is that they'll recommend your collective to someone they know. Establish a baseline with your first survey and put measures in place that will help those numbers grow quarter to quarter.
8. **Outreach Rate:** Outreach rate measures how often you're getting in touch with your participants. You can focus in on one specific outreach channel—say, your email campaigns—or look at your overall outreach strategy to see where you're approaching participants most and if you need to reach out more in a certain area. Outreach rate is another way of determining how successful your stewardship is. If you aren't contacting participants on a regular basis, your retention rate will likely suffer.
9. **Number of Participants**: Similar to profit, this performance indicator is fairly straightforward. By determining the number of participants you've gained and lost, you can further understand whether or not you are meeting your community's needs.
10. **Participant Turnover Rate (PTR)**: To determine your PTR, take the number of participants who have departed the collective and divide it by the average number of participants. If you have a high ETR, spend some time examining your culture, participant engagement, and collective environment.
11. **Knowledge Achieved with Training**: Helps the collective see the effectiveness of training and leadership development.
12. **Assimilation**: This metric directly impacts the spiritual strength and depth of your collective. Do you have a strategy for welcoming and integrating new members? Do first-time guests want to come back for more because they had a positive experience or are they going to be a one-time "customer"? Attention to assimilation can help you effectively welcome new members and assimilate them into the community of your congregation of believers rather than passively hoping that they decide to come back and stay involved. [Adapted from acstechnologies.com]

Visitor Metrics

13. **Visitor Churn Rate**: This metric indicates the percentage of visitors that either fail to make a repeat visit or discontinue their attendance during a given period.
14. **Contact Volume by Channel**: Keeping track of the number of support requests by phone, social media and email allows you to see which method people prefer, as well as the number of inquiries month-to-month.
15. **Number of New vs. Repeat Site Visits**: Allows you to differentiate your website traffic and generate insights on prospective visitors. Formula: (Website Visits by New Visitors) / (Total Website Visits) = percent of new visitors.

Resources

5 Ways Tracking Church Attendance Messes with Your Soul
Is Your Church Plant Making A Difference?

Fundraising Metrics

As part of an ongoing effort, analyze isolated areas of weakness that are primed for targeted improvement in your donation gathering processes. An article by Salsa Labs titled 20 Key Performance Indicators Nonprofit Management Needs to Track suggests these KPI will answer:

- How many donations did your organization receive this year?
- What channels did those donations come through?
- What were the standard donation sizes?

16. **Gifts Secured:** This accounts for how many gifts your collective received over a set amount of time. You can track a week, a month, a quarter, a year...whatever span of time is most informative. For more granular insights, you can also split this metric up by gift type.
17. **Donation Growth:** This metric tracks your gift secured over a longer span of time to help you make sure you're meeting your long-term fundraising goals. With donation growth, you can see any patterns that are emerging with your donations and adjust your strategies accordingly. For example, if you're able to look back on the year and see that your donation growth stagnated or dropped in a specific month (say, August), you might be able to use that information to plan for that period next year. Once next August rolls around, you can make sure your team puts out a more concerted effort to secure donations around that time.
18. **Average Gift Size Growth:** Like its name suggests, average gift size growth measures the percentage by which your average gift size has increased over a certain period of time. Say your goal is to raise your average gift size by 25% over the coming year. One of the easiest ways to see a 25% growth in donations for the year is to spur your participants into each donating 25% more during that year. If you see that your efforts net you a large number of new donors but everyone is donating in small amounts, perhaps you can leverage your relationships and spend less time focusing on finding new donors and more time cultivating the ones you already have. This KPI is an excellent way to make sure your fundraising isn't becoming stagnant. You want to grow, and the only way to do that is to consciously keep track of your growth to make sure you're improving.
19. **Pledge Fulfillment Percentage**: This tells you what percentage of your pledges are being fulfilled. While you'll always want to account for a certain amount of error, knowing more accurately the pledging patterns of your constituents over a historical period can really help you forecast how many funds you'll *actually* receive and prepare accordingly.
20. **Online Gift Percentage:** Online gift percentage tells organizations what portion of their overall donations have come from online channels, primarily their online donation page.
21. **Donor Retention Rate:** Donor retention rate allows your organization to track what percentage of donors in your base have given more than once - how many of your contributors are recurring donors. Recurring donors are incredibly valuable. In fact, 87% of those funds are made by recurring donors.
22. **Donor Growth (Year-Over-Year):** Your year-over-year donor growth simply tells you how much your donor base has grown (or shrunk) over a year-long period. If this KPI is negative, well, there aren't going to be many indicators that act as a bigger red flag. If you're losing donors, odds are, you're losing ground in other areas.
23. **Recurring Gift Percentage:** This tells your organization exactly what portion of your total gifts come from recurring donors. If you can confidently expect that you'll continue to receive those gifts and recognize where those gifts are coming from, you may be able to leverage that and begin a small, targeted campaign to increase those gift sizes.

Giving Metrics

24. **Conversion Rate:** Conversion rate tells you how many participants took an action when prompted. To measure this KPI you need to look at a specific call-to-action, i.e. Sunday Morning offering period. Differently, if you're collective runs advocacy campaigns, you could measure how many supporters signed an online petition you included in your outreach. In fact, it can be more insightful to look at the conversion rate for CTAs other than asks. Your relationships with your participants run deeper than simply requesting and receiving tithes, so it's important to determine that you're engaging them beyond the giving process.

This metric can be useful in two main ways:

- It allows your organization to see if your outreach strategies are effective.
- By tracking other interactions with your collective, you can gain more insights into the habits and affinities of your participants base to pinpoint further opportunities for engagement.

If you want to make sure your stewardship is healthy and diverse, there's no better way to do so than by tracking conversion rate.

The right KPIs for you might not be the right KPIs for another organization. Make sure you've researched as many key performance indicators as you can to determine which ones are appropriate for your collective. From there, determine which KPIs will help you further understand and meet your goals, and then integrate them throughout your culture. KPIs should match your vision, mission and strategy.

Resources
Google Analytics for Nonprofits – Website Key Performance Indicators (KPIs)
20 Important KPI's For Measuring Event Success
Improve How You Count What Counts
Giving Metrics That Tell a Church's Generosity Story
12 Metrics for Church Assessment

Kingdom KPI

1. **Apostolicity:** This is the apostolic function to maintain and develop the *sentness* of the collective. And given that mission is clearly a central aspect of the church's purpose, the function is absolutely indispensable if the church is to remain true to her calling. Is there a culturally embedded drive to ensure that the church is faithful to its missionary calling?
2. **Evangelism:** Church plants that are intentional with evangelism have more unchurched people in their congregation. What is your plan to reach unchurched members of the community? What Missional Markers will help drive this effort?
3. **Baptism:** Just as the baptism represents the death, burial and resurrection of Jesus Christ, it symbolizes the death and burial of the old self of the repentant believer, and the joyous birth of a brand new being in Christ. Do you off the opportunity to join other Christians in this divine gift and human response?
4. **Visibility:** Having a public presence has a large impact on worship attendance. The more the see your collective outside of its regular gathering space, the more likely you are to improve overall participation.
5. **Multiplication:** Church plants that are intentional at starting at least one daughter collective within their first five years see a consistent increase in attendance. How have you bred an ethos for multiply from day-one? Assess the stewardship of you talent, treasure, and time for planting more churches.
6. **Leadership Development:** In the words of Bill Hybels, "Everyone wins when a leader gets better." What tracks for leadership growth do you have in your ministry? How will you assess and determine a leadership readiness for spiritual graduation?
7. **Celebrations:** If you have ever read the Bible, you will notice there is a festival, feast or gathering for almost everything.

More

I'm sure you are thinking, "More? More?! What more could we do?" But there is always more. So, let's get at it...

Evaluation is Essential

Strategic planning is an important part of the creation, development, and growth of any organization.

> ***Strategic planning*** *is an organization's process of defining its strategy or direction and making decisions on allocating its resources to pursue this strategy, including its capital or people.*

Valuate your Values

It is difficult to know where to focus efforts and resources without being able to articulate what it is you are trying to do. Imagine taking a vacation without first deciding where you are going or how you will get there. The first, and arguably most important, step of the strategic planning process is clarity around your vision, mission and values statement.

Write your vision:

Write your mission:

Write your values:

If you haven't changed these since you first wrote them years ago; chances are, already outdated. In a very short time, your collective has morphed into many manifestations of your original big dream. Take a few moments of evaluation to consider the way each needs to be updated.

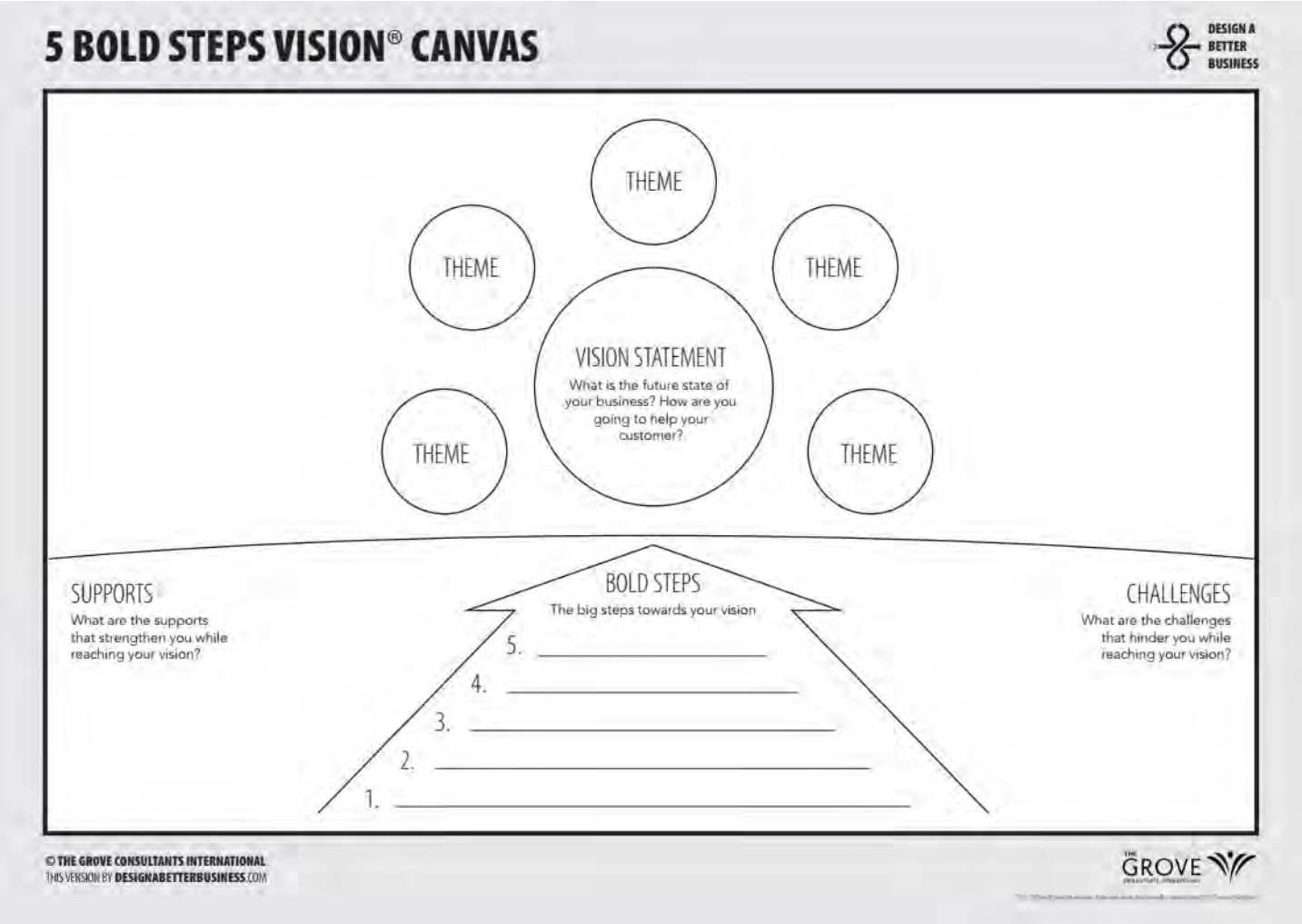
New vision:

New mission:

New values:

Sustainability Stimulators on Vision

1. Ask your Merger, Does this action, activity or 3P get us closer to realizing our vision?
2. Vision is a compass
3. A vision statement must point out the where, when, and also the how.
4. The whole collective should design the vision
5. State the collectives desires in the next 2-5 years
6. Rally – include inspiration and excitement
7. Detail 5 bold steps by which to achieve. Try using this visual:



Resources

A Step-by-Step Exercise for Creating a Mission Statement

Grading by Gap Analysis

A gap analysis answers the question, "Where are we compared to where we want to be"? The process looks at the vision – where do we want to go – and compares it to where we are currently.
The analysis can be in relation to ministry program development, discipleship, financial viability or customer experience. All areas will be identified and targeted for strategy through the gap analysis process.

An example of a collective's current state:

- The collective is renting a temporary facility until it can build a permanent building;
- The collective is lacking volunteer leadership;
- The collective children's program is lacking weekly training curriculum;
- The collective lacks a process for discipleship.

Let's do a quick Gap Analysis based on core areas of congregation life:

Core	Score	Deficiency	Next Step
Leadership			
Participation			
Community			
Platform			
Finances			

SWOT Analysis

A SWOT analysis is a great exercise to go through because it identifies the key areas of the collective that may need targeted resources as well as opportunities or opposing environmental factors that could affect sustainability.

- **Strengths:** Characteristics of the collective that may give it an advantage over others
- **Weaknesses:** Characteristics of the collective that may be a disadvantage as related to others
- **Opportunities:** Conditions outside the collective that could potentially increase attendance or giving
- **Threats:** Conditions outside the collective that could create problems for the collective

Do a quick SWOT analysis for the current state of your collective then brainstorm next steps for each:

Internal (Programs, Projects, Participant Placement) Analysis	
Strengths	Ideas for building upon these strengths
Weaknesses	Ideas for minimizing/strengthening these weakness

External (Community Impact) Analysis	
Opportunities	Ideas for investigating and take advantage of these opportunities
Threats	Ideas for minimizing or overcoming these threats

For example:

- **Strength:** The collective is located on a busy street and has high visibility in the community.
- **Weakness:** A small percentage of the collective population is of other races/ethnicities.
- **Opportunities:** The collective is located in an area with a high population of Hispanic families.
- **Threats:** The collective is located in a small town with an aging population.

[Adapted from smartchurchmanagement.com]

Resources

The Five Rs of Setting Annual Goals

What Does 'Impact Measurement' Really Mean?

Building a SMARTER Collective

SMART is an acronym that goes by several variations but my favorite is Specific, Measurable, Attainable, Realistic and Time-bound.

- A ***SPECIFIC*** goal is unambiguous. Your goals should be precise and you should have a very clear understanding of the desired end result. When setting specific goals, ask yourself, "What do I want to accomplish?" Be as detailed as possible when answering this question.
- If your goal were ***MEASURABLE***, you would be able to answer these two important questions: Are you on track? How do you know when you accomplish it?
- Setting a goal that is not attainable is a huge mistake; it must be ***ACHIEVABLE***. While it's important to aim high, it's also important to be realistic. When setting achievable goals, ask yourself, "Do I have the ability to make this happen?" You may also want to think about what types of barriers could prevent you from achieving your goal.
- By not committing to your goal and by not making it a priority, you are setting yourself up to fail. Your goals should not only be important to you, they should be motivating. When setting ***RELEVANT*** goals, ask yourself, "What do I need to neglect intentionally or be released from in order to focus on this?"
- Finally, a ***TIME-BOUND*** goal sets a point in the future to hold yourself accountable. Did you or did you not hit your goal by the date set.

Resources

Why It's Dumb to Set S.M.A.R.T. Goals

Examples of Setting and Achieving S.M.A.R.T Goals from ekklesia360.com:

Goal: We want to increase giving dollars.
SMART Goal: We want to increase giving dollars by 10% by March.

Goal: We want to get new followers.
SMART Goal: We want to baptize 100 people by July 31.

Goal: We want to increase the amount of money in our building fund.
SMART Goal: We want to double the amount of money in our building fund by the end of the year.

Goal: We want to give our members more chances to participate in small group studies.
SMART Goal: We want to hold four different small group studies two times a year

For many of you, SMART goals are neither new nor revelatory. I would also wager that by implementing the above, you may have increased your odds of success but you still may not be achieving your goals at the rate with which you would like to be.

Attributes vs Actions

What the SMART system does is allows us to set goals with specific **attributes** that make it more likely for us to achieve those goals. What we need in conjunction with these attributes is a system of **actions** that complement the SMART system. So, let us graduate together from SMART goals to SMART**ER** goals.

E – Evaluate
To evaluate is to **create a process** and **actively** test yourself against your goal as time progresses. This is an expansion on the *MEASURABILITY* of a goal. Creating a measurable goal is passive. It ensures that you *can* measure it along the way. However, just because you *can* measure your progress doesn't mean you *have* or frankly, ever will.

This evaluation process should cover three bases:

1. What benchmarks are you testing that ultimately lead to your goal?
2. What is your checkpoint frequency to test these benchmarks?
3. What progress should you have made at each checkpoint?

R – Reward
Celebrate small wins at each checkpoint with equally small rewards. For example, if your collective has a lot of families with small children, a checkpoint reward could an outing together after service.

Finally, your large reward comes after achieving your ultimate end goal. To stay with the theme, an appropriate large reward may be renting a bouncy house for the kids and through a small BBQ. I suggest scaling the size of your large and small rewards to the size of the overall goal itself.

Alternative **Rs is ROI (Return on Investment)** – The Effective Church Group gives great insight on this. The R can also stand for **Readjust**. If, for example, you find yourself pursuing a goal but continuously hitting a brick wall, readjust your method and techniques. Readjust doesn't mean that you have to throw your goals out and start all over. What it means is that you have to try different approaches until you find yourself getting closer and closer to your goals. That's why constant evaluation on a daily basis is so important. If you don't evaluate you can't measure your progress. [Adapted from wanderlustworker.com]

By adding a process or *actions* to your goals, the likelihood that you will achieve them will increase dramatically.

Resources
Critical Components of SMART Church Goals
A Way to Plan If You're Bad at Planning
Vital Signs: Why Church Help Matters and 14 Ways to Measure It

The Hope Partnership for Missional Transformation's Leadership Academy provides participants with church development and transformation training and educates leaders on healthy habits in growing viable ministries.

Learn more at www.hopepmt.org

Connect with us on social media at
https://www.facebook.com/hopepartnership
https://twitter.com/hopemissional

Join our Leadership Academy Facebook Group at https://www.facebook.com/groups/leadwithhope/
Join our Sustain Track cohort's Facebook Group at https://www.facebook.com/groups/sustainnewchurch/

For additional learning opportunities, visit www.NewChurchHacks.com