

Subject: Implementation of CUMC Strategy

- 1. Purpose.** The goal of this effort is to offer a plan to continue implementation of Crozet United Methodist Church's (CUMC) strategic plan. A strategy provides an organization with a roadmap to pursue a specific strategic direction, set performance goals, serve people, and be successful. However, it is still just a strategy; it doesn't guarantee that the desired performance is reached any more than having a roadmap guarantees the traveler arrives at the desired destination. Implementation is the process that turns strategies and plans into actions in order to accomplish strategic objectives and goals. Every successful organization has a strategy. What makes these organizations successful is the implementation.
- 2. Overview.** CUMC is a vibrant church with strong community roots, an exciting worship program, and outreach to the community. CUMC's 'Love, Grow, Go,' model offers an excellent structure to minister to the congregation and community at large. CUMC's buildings and grounds provide an appealing environment for worship and service. The church is actively working to identify, select, and equip its leaders for service.

The Crozet area is fertile ground. Recent research shows that between 70 – 74% of the residents currently claim "no religious tradition." Interviews with the CUMC leadership shows a desire to grow and reach out to the community. More so than any other organization I have worked with in the last 15 years, CUMC leaders show an openness to change and implement the strategy.

- 3. Methodology.** As a part of this assessment I compared CUMC's current strategic plan with other nonprofit organizations and recognized 'best practices' for strategy development. I interviewed over 20 individuals (leaders and congregants) to understand how people see CUMC and how they see the strategic plan. Based on this effort, I categorized the recommendations in to three groups:
 - **Foundational Tasks** - Tasks that provide a foundation for any future effort.
 - **Strategic Initiatives** – Four high priority initiatives derived from the strategic plan that equip the church for further success.
 - **Sustaining Tasks** – Tasks that sustain the strategic plan implementation effort.

The recommendations addressed here do not represent each and every action to implement the strategic plan. This effort is limited by design. The recommendations allows CUMC to start at a manageable level, build experience, and create momentum to enable further success. The goal is not to overreach but to identify and accomplish a number of tasks and initiatives, do them well, and then develop new initiatives that support implementation of the strategic plan.

- 4. Prayer.** As we continue the process of implementation it is critical that we pray. We need to ask the Holy Spirit for discernment so that we are in HIS will. We need to ask the Holy Spirit to guide our communications and choose the right people. We need to ask the Holy Spirit to guide all of our efforts.

5. Foundational Tasks. Through interviews, comparison with other organizations strategic plans, and application of best practices, I identified three basic tasks that are foundational to execution of the overall strategy. These three tasks can be completed in a short period of time and should be accomplished at the earliest opportunity.

5.1. CUMC Stakeholder Identification.

Summary: A shared understanding of who we serve and who we are called to serve should be the focus of our mission and what we do at CUMC. As the first step in implementing the strategic plan, CUMC needs to agree on who we serve.

Discussion: Analysis of our stakeholders - who we serve (the groups we focus our time, talent and treasure on) might be considered by some to be a waste of time. However, as a part of the interviews, I did not identify any shared vision or consensus of our primary or secondary stakeholders. Knowing and understanding CUMC's stakeholders is the cornerstone of our ministry. It allows us to focus our external and internal communications, our time, our talents, and our treasures. Do we focus on our existing membership? Do we focus on young families seeking a church? Do we focus on people in the local area who are in need? Do we focus on overseas missions? Focus on specific stakeholders does not mean we turn people away, but successful organizations have a shared agreement on where we concentrate our efforts.

Recommendation: The Administrative Board should meet in a facilitated session to identify and prioritize CUMC stakeholders.

5.2. CUMC Mission.

Summary: A mission is foundational to any strategy and the cornerstone of why an organization exists. As the second step in implementing the strategic plan CUMC should examine, consider and adopt a mission statement for CUMC.

Discussion: A mission statement is the cornerstone of any strategy. The mission statement is a brief, strategically scoped and succinct statement that describes why the organization exists – its purpose. The mission is the aiming point for the organization and guides decisions about priorities, actions, and responsibilities. Many nonprofit mission statements succumb to an over use of words in general, but especially jargon. Good mission statements should be clear, memorable, and concise. The mission statement is not a wish. The mission statement is not a vision.

A vision statement should not be confused with a mission statement. The terms are often used interchangeably, but mission statements are present-based statements designed to convey a sense of why the organization exists to both members of the organization and the external community. Vision statements are future-based and are meant to inspire and give direction to the members of the organization. A mission statement answers the question, "Why does the organization exist?" while a vision statement answers the question, "Where do the members of the organization see the organization going?"

Currently CUMC's mission statement exists in several forms. The strategic plan does not reference a mission. The CUMC Web Page lists a "Vision and Mission Statement": **Because we believe in Jesus Christ, it is our mission to show the love of Christ through our actions and service to all. We will accomplish our mission by showing the love of Christ through our hands, in service to all, our heads in learning and growing in the knowledge of Christ, and our hearts in ministries of love.** The 2013 Charge Conference report quotes a different mission: **"The mission of Crozet United Methodist Church is to lead people into a love-relationship with Jesus Christ, to encourage them to grow in discipleship, and to equip them to go out and transform the world."**

Recommendation: The Administrative Board should meet in a facilitated session to discuss, examine, and adopt a mission statement for CUMC.

5.3. Implement and Communicate the Organizational Structure.

Summary: CUMC's 'Love, Grow, Go,' model offers a structure to minister to the congregation and community at large. However, leadership positions have not been resourced, the model has not been implemented, and people are confused as to the specifics. Based on the identified stakeholders and the mission, CUMC should work to staff and communicate the 'Love, Grow, Go' model.

Discussion: Several years ago, CUMC reorganized their ministries focused on a model to make disciples developed from the book Simple Church: Love, Grow, Go. The beauty of the simple church model focuses on streamlining the disciple-making process. Simple churches thrive by taking four ideas to heart: clarity, movement, alignment, and especially focus. However, without staffing CUMC's ability to move forward as well as align and focus on Love, Grow, Go is inhibited.

The disciple making process is at the core of Christianity. It is the cornerstone of the 'Great Commission.' In fact, mission and service are foundational to our denomination. To fulfil these requirements CUMC must renew our focus on the Love, Grow, Go model. Originally envisioned as paid positions, currently two of the three coordinator positions (Grow and Go) remain unfilled. While current giving may not support paid positions over time, startup funding may be available in a Strategic Staffing Fund. However, no matter of the positions are paid staff or volunteer, CUMC will benefit from staffing the positions. Great things are happening at CUMC, but as a church, we are not deliberate in our planning or execution. Using the Love, Grow, Go model will allow us to deliberately focus our planning, resources, and leadership and enable our disciple-making process.

Recommendation: Source the Grow, and Go coordinator positions as soon as possible. If funding does not exist, identify strong volunteers with a passion for these functions. Specifically communicate the roles and relationships between the paid staff positions, the committees, the coordinators, and the pastors. Identify the needs of our membership (to equip the body of Christ), the community (to attract and retain new members), and those in need (to identify the specific gaps that need to be met). Begin with incremental improvements to the existing programs.

5.4. Improve Leadership Communications.

Summary: Robust communications among the leadership strengthen relationships, lessen frustrations, and equip us for success.

Discussion: Throughout the interview process, individuals repeatedly expressed frustration with our internal communications. While people recognized that church leaders desired to be transparent, actual implementation was identified as an issue. Repeatedly people questioned “who was doing what, for whom, when they were doing it, where they were doing it and why they were doing it.” Looked at in a vacuum, this could be seen as a depressing finding, however commercial and government organizations encounter greater communications issues than those identified at CUMC. Many organizations, especially churches encounter this problem.

Recommendation: While technology and tools can support resolution, the solution begins with a deliberate effort on the part of leaders. Pray for the Holy Spirit’s intervention. Make no assumptions. Early on, leaders need to specifically identify who needs to know, communicating in detail, using multiple media to pass the message, and soliciting feedback to ensure the message is understood. Leaders should ensure they pass their support requirements (ask questions) to other committees early.

- 6. Strategic Initiatives.** Through interviews, comparison with other organizations strategic plans, application of best practices, I derived four initiatives that enable the accomplishment of church wide goals and that are foundational to execution of the overall strategy. These four initiatives are limited by design. Four initiatives allows CUMC to start at a manageable level, build experience, and create momentum to enable further success. The goal is not to overreach but to implement these four, do them well, and then expand.

6.1. Improve Internal and External Communications Initiative. Supports CUMC Strategic Plan Goal #9 – Improve external and internal communications.

Summary: In the Gospel of Mark, Jesus tells us to “go and make disciples.” Key to that effort is the requirement to effectively communicate, both internally and externally.

Discussion: We live in a “Now” world, where people want, demand, and expect real time communications – at home, at work, and at church. One bad event can cause bad attitudes, finger pointing, and hard feelings.

The bottom line is that we need to communicate with people, both in the congregation and in the community. Internally we need to communicate to people not just what is happening at CUMC, but encourage the congregation to look beyond itself, into the world, and seek opportunities to move from worship to work, witnessing God's grace to those outside of the church. Externally we need to communicate to people not just what is happening, but how CUMC and GOD can affect their lives. There are people in the community that don't know GOD. There are children without fathers, families without hope. External communications tell them CUMC exists, and what it exists for.

Some of the congregation may be uncomfortable with the concept or the tools such as Twitter or Facebook. While change is difficult, we cannot water down or deviate from the gospel. Our goal is to make disciples and offer grace, not conform to the world.

Luke 14 ²³ "Then the master told his servant, 'Go out to the roads and country lanes and compel them to come in, so that my house will be full.'"

Recommendation: Identify, resource, and empower a communications team. Based on the identification of our stakeholders (Paragraph 5.1), develop a communications strategy to address target audiences, key messages, and communications vehicles/tools. Coordinate efforts with the team developing the Become an Invitational Church Initiative (Para 6.3). Begin with the web site and broadcast emails. Expand into Facebook, Twitter, and Instagram as soon as we are able.

6.2. Become an Invitational Church Initiative. Supports CUMC Strategic Plan Goal #1 – Increase average weekly worship attendance to 250.

Summary: Growing the congregation requires a planned deliberate effort to understand the community, reach out to the people of Crozet, and invite people into the community of faith.

Discussion: The interviews show a belief that CUMC is a welcoming church. Research also shows that each week people visit CUMC. Individual members take the time to meet new attendees, welcome them, and show interest in them. This is a good news story, because many churches don't! However, to grow the church and fulfill the Great Commission, we need to take this further. We need to actively invite and follow up on visitors. We need to identify what drew them to CUMC, why they stay, or why they leave. If we sincerely believe the gospel that knowing Christ is the best way to live and the only way to die, than we must look for collective and individual opportunities to invite people to CUMC and engage them once they are here.

1 Corinthians 9 ²⁰ To the Jews I became like a Jew, to win the Jews. To those under the law I became like one under the law (though I myself am not under the law), so as to win those under the law. ²¹ To those not having the law I became like one not having the law (though I am not free from God's law but am under Christ's law), so as to win those not having the law. ²² To the weak I became weak, to win the weak. I have become all things to all people so that by all possible means I might save some. ²³ I do all this for the sake of the gospel that I may share in its blessings."

Recommendation: Based on the identification of our stakeholders (Paragraph 5.1), and leveraging the experience of Pastor Barbara Parnell, identify and implement specific actions and events to showcase CUMC in the community. Working through the Grow Coordinator, invite people to CUMC, and connect with them once they are in the door. Coordinate efforts with the team developing the Internal and External Communications Initiative (Para 6.2).

6.3. Community Service and Ministry Initiative. Supports CUMC Strategic Plan Goal #1 – Increase average weekly worship attendance to 250.

Summary: CUMC's *Love, Grow, Go* model charges us to "go out and change the world." CUMC currently has several programs that serve the community, however, more can be done. Through this effort, CUMC can better show the love of Jesus Christ to the community as well as raise visibility of CUMC in the community.

Discussion: Currently CUMC's service to the community is 'organic.' Individuals identify needs, develop plans, and execute ministry. The youth currently participate in Impact Richmond, the UMW is leading the initiative to assemble health kits for Annual Conference, and the church executes the monthly food pantry. But more opportunities are available. The Farmers Market uses our property, but we don't routinely engage with this event. While by many measures, the Crozet community would be called affluent, the 2010 census data shows 4.6% of families and 7.1% of the population live below the poverty line. To grow the church and fulfill the Great Commission, CUMC should take the next step and routinely plan and execute ministry in to serve the community.

2 Corinthians 9: ¹³ Because of the service by which you have proved yourselves, others will praise God for the obedience that accompanies your confession of the gospel of Christ, and for your generosity in sharing with them and with everyone else.

Recommendation: Work with the Go Coordinator, the UMM, the UMW, and Pastor Chandler to develop an initiative to reach the community. Develop the initiative to not just do works of service, but build relationships with the community and showcase the gospel.

6.4. Expand the Small Groups Initiative. Supports CUMC Strategic Plan Goal #6 – Evaluate Christian Education offerings.

Summary: Small groups provide a great way for people to make friends and learn about one another. Small groups provide an ever-expanding network for communication and impact. Small community groups within a church of any size are important for growing your relationship with God.

Discussion: Christian life is corporate. Building relationships inside CUMC encourages individual commitment, equips people for service, and strengthens our witness to the world. As important as it is to cultivate a personal relationship with GOD by practicing the spiritual disciplines, we need others to help us in our journey. John Wesley saw this years ago and used his 'Class meeting' to support and equip Christian disciples.

Currently, CUMC hosts several small groups, but these benefit only a portion of the congregation. Additional group opportunities can help us to spend time in God's presence, grow in our faith as we apply what we're learning to our daily life, build new and deeper relationships, and reach out to impact the community.

Hebrews 10: ²⁴ And let us consider how we may spur one another on toward love and good deeds, ²⁵ not giving up meeting together, as some are in the habit of doing, but encouraging one another—and all the more as you see the Day approaching.

Recommendation: Work with the Grow Coordinator and Pastor Chandler to expand the small groups at CUMC. Identify a model that focuses the group on building relationships. Leverage existing groups to promote relationships and spiritual growth. Look at home groups, groups based on life stage or interest, ministry or task based groups, and creative groups. Start small with three or four groups and leverage internal communications to build support.

7. Sustaining Tasks.

7.1. Equipping our Leaders.

Summary: CUMC has a very strong program to identify and recruit the right people for the right position. Expanding this program to include training will strengthen an already powerful program.

Discussion: Whether it is cutting the grass or feeding the hungry, or carrying the gospel to Africa, the people of CUMC are critical to implementation of the strategic plan. Today, CUMC's Committee on Nominations and Lay Leadership is leading an effort to broaden the leadership base and grow new leaders for the long term. This is an exciting initiative that is worthy of celebration. However, more needs to be accomplished. Recent interviews identified frustration with basic ministry planning and internal communication. Ministry planning allows CUMC to identify, and coordinate across committees, the specific requirements, supporting tasks, and resources to ensure we successfully accomplish what we want to do. Internal communication provides the right information to the right committee PRIOR to an event to allow leaders to make informed decisions. Internal communications provides the right information to the congregation to allow members and guests to understand opportunities for service. Internal communications focus not on more meetings, but proactively providing needed information.

Recommendation: People are key to everything we do and equipping our leaders are foundational to success. To enable our people and support strategy execution, recommend the Administrative Board task the Committee on Nominations and Lay Leadership to develop a basic planning tools and communications training. Recommend the Administrative Board task the Committee on Nominations and Lay Leadership to identify additional requirements that could better equip CUMC leaders.

7.2. Goal assessment and planning.

Summary: CUMC Committees have done significant work on many of the existing strategic goals. Review and assessment of these efforts will ensure a shared vision of where we are now, and where we should be in the future.

Discussion: Implementation of CUMC's strategic plan depends on regular feedback to, and tracking by, the Administrative Board. A review and assessment of the previous effort and current / future initiatives to meet the strategic goals will provide a baseline for the overall strategy.

Recommendation: Recommend Trustees (CUMC Strategic Plan Goals 2, 10, and 11) and Finance (CUMC Strategic Plan Goal 3) review and assess their respective strategic goals. Trustees and Finance should recommend closure of a specific goal or describe future actions needed to meet the goal. Recommend the Pastor Parrish Relations Committee, UMM, and UMW review and assess their programs to identify specific initiatives that support the CUMC strategic plan. As a part of tracking the overall implementation, the Administrative Board should track this status.

7.3. Metric Development.

Summary: Measurement drives corporate and individual behavior. Recommend the Administrative Board begin using metrics to track CUMC implementation of the strategic plan.

Discussion: Most organizations develop a strategy. However, the difficulty frequently arises in how to measure implementation of that strategy. For both the organization and the individual, measurement motivates. Measurement tells staff and leaders that an activity is important.

- **Develop metrics.** Develop two or three metrics per strategic goal. To maximize effort and avoid duplication, use existing metrics where possible. These performance metrics provide for:
 - **Control.** Performance metrics enable superiors to control and evaluate the performance of the people working under them. They also enable staff and volunteers measure their own performance.
 - **Reporting.** Performance metrics allow organizations to report performance internally and externally.
 - **Communication.** Performance metrics communicate to people both internally and externally what constitutes value and what the key success factors are.
 - **Opportunities for Improvement.** Performance metrics identify gaps between performance and the expectation. Intervention takes place when we have to close undesired gaps. The size of the gap, the nature of the gap (whether it is positive or negative) and the importance of the activity determines the need for management to resolve these gaps.
 - **Expectations.** Performance metrics frame expectations both internally (within CUMC) and externally (with the community, Charlottesville District, and the Virginia Conference). Metrics help shape people's expectations.
- **Identify Collection intervals.** When possible, stagger collection periods to ensure you don't overwhelm the staff, leadership, or the Administrative Board.
- **Begin data collection.** Identify a single point of contact to collect the metric data. Identify an 'owner' of each goal to collect the metric data and monitor performance.
- **Integrate metrics into the review process.** 'What gets measured gets done.' Integrate metric review with the staff and Administrative Board meetings.

Recommendation: To drive and measure performance, CUMC should develop metrics and targets for each goal as the basis for the performance measurement system. The Administrative Board can begin by reviewing existing Vital Congregation (required by the denomination) metrics at each meeting.

7.4. Strategy Management.

Summary: Managing strategy requires a deliberate and continuous effort to examine progress, allocate resources, and focus effort to attain CUMC's strategic goals.

Discussion: Too often great plans stay as 'plans.' Frequently, the energy and enthusiasm generated during the planning process can ebb, swamped by the weight of day-to-day operational issues. However, successful organizations use effective and focused strategy reviews keep focus and drive effectiveness.

Recommendation: To keep strategic focus, CUMC can use the existing Administrative Board's meetings to examine progress against the strategy. The following steps offer a roadmap to manage CUMC's strategy.

- **Establish review timelines.** Communicate review dates to the staff and volunteers to allow them plan accordingly.
 - **Prepare for the review.** Successful implementation revolves around five key concepts:
 - ***Communicate Strategic Priorities Up Front and Stick to Them:*** Regardless of how clear the strategy is, leaders cannot expect the staff and congregants to guess the most important elements. Before each meeting, leaders need to communicate the objectives and initiatives that merit emphasis.
 - ***Ask the Right Questions:*** Organizations frequently lose strategic focus. CUMC leaders can improve focus by identifying the desired outcome and asking how this support the strategic plan. Once implemented, leaders ask why a program may underperform, but frequently fail to ask how to improve performance. As a part of this discussion, leaders also need to address resourcing and risk: what is the risk if we address this issue and what is the risk if we do not address this issue? Lovett Weems' (Lewis Center for Church Leadership) and Tom Berlin's (Senior Pastor at Floris UMC) book, *Bearing Fruit* offer a great insight into this process.
 - ***Foster an Environment of Participation:*** Engage people in the discussion, encourage active voices, and call upon the listeners to contribute.
 - ***Foster an Environment of Inquiry:*** Implementing a new strategy requires a culture shift and promote an environment of trust.
 - ***Celebrate Wins:*** Strategy implementation requires buy-in from leaders and staff. Organizations gain buy-in and momentum by celebrating progress in performance and initiatives.
 - **Review initiative progress with the Board, Committees, and Coordinators.** Each month, review the progress of one initiative or goal. Make sure to tie the initiative back to the strategy for the staff. This will reinforce their connection with the strategy.
- 8. Summary:** CUMC's hard work and dedication to building the Kingdom of God in Crozet is evident in the strategic plan. However, the long term success of CUMC's strategy requires more than a system and series of procedures. People make the change happen and thus coaching and equipping is essential to CUMC building capabilities to drive implementation and institutionalization of the strategy. I remain available to support implementation for the Administrative Board, the committees, or individuals to enable success.