

## *Some Basics for Planning*

Planning for a healthy ministry is an important part of moving from ideas to action steps. Without a plan, action steps can remain conceptual and hard to implement. Even the cursory plans we make are often short of being actual plans but instead more like pointers and hopes for outcomes than real plans.

This simple paper is designed to provide some basic pointers for planning. Using it as well as other planning aids may provide you with the keys to doing concrete tasks and producing solid results.

### SOME KEYS TO GOOD PLANNING

1. ***Be clear what you are trying to accomplish!*** It may be that you still don't get it done or that the best outcomes are unexpected and not what you planned. Plan for something in particular anyway!
2. ***Clarify how what you plan is related to your purpose, values/guiding principles, and the strategic directions of your group or organization.*** If something sounds good but doesn't fit these things – it may be a good tangent but it is still likely to be a distraction. This is not to say that you can't do anything that isn't related to these things – just a reminder that if you do, you should know why.
3. ***Involve the people most impacted or relied on.*** Too often a leader or small group of leaders makes a plan. Then the people responsible for making it happen have to be identified or recruited to get them involved. If you have some idea what you are hoping to do, involve them first and include them in some ways in the actual planning. It is far more likely to happen if they own the idea and help shape it.
4. ***Plan for shorter windows of time.*** Historically, many plans are long term – many ideas lasting over a year to implement (remember the 5 year strategic plan?). History in the church has shown that unless the project is huge (like a building campaign and construction), most of these plans get sidetracked. People lose interest, move on, become disappointed, etc. It is fine to have some longer-term visions and outcomes in mind, but plan in smaller pieces in the 3-6 month timeframe instead. If something is bigger than can be done in that time, plan for the next few months and then make a follow up plan for the ensuing months as they get closer. You'll have more chances to celebrate success and make course corrections and as a result you can make better plans.
5. ***Develop accountability for your work.*** No plan is better than the outcomes it produces. Planning has been its own outcome for too many in the church! But a plan is an intermediate step between an idea and an action. Include accountability (reporting mechanisms, coaching, etc.) in the plan and you will increase your chances of success.

6. **Be sure to say “thanks.”** One key to plans happening are people who want to see it happen. Be sure to say thank you to people along the way and when things are done. People who feel appreciated are given cues that they and the work they do matter. That helps communicate the success of what they have been doing and motivates people to want to be involved in the future.

## SPECIFIC PLANNING STEPS

In order to complete a full plan, the following questions should be asked and answered. Not answering even one of these questions reduces your chances of success noticeably. Leave out two or three and you no longer have anything that can be defined as a plan – you have a wish list. So here are key questions that should be asked and answered in order for your plan to be complete:

1. **OUTCOMES:** What are you planning for – specifically, what do you hope to accomplish?
2. **STRATEGY:** How does the thing being worked on relate to and/or further the organization’s purpose, guiding principles and strategic directions?
3. **WHO?**
  - a. Who needs to be involved in planning this idea? Are there outside partnerships that should be included in planning? Have they been consulted or invited in?
  - b. Who is responsible for overseeing the work?
  - c. Who is responsible for carrying out any sub-plans/steps in this project as they are identified?
4. **ACTION STEPS:** How will you get it done? What steps do you need to take?
5. **WHEN:** When will the plan be done? When will intermediate steps along the way be done?
6. **MEASURING SUCCESS:** What will “success” likely look like? How will you recognize it if it happens? This is about how you will measure results.
7. **ACCOUNTABILITY:** How will accountability be provided? Is there a supervisor? A coach? Both? Other?
8. **OTHER:** Other questions that may arise specific to the work being done.

For each project being planned, using the above questions and providing some space to answer them in a worksheet format can be very helpful. A simple two-page planning worksheet follows at the end of this paper. A key leader who is facilitating the planning can work through the questions, document clear answers and have a completed plan when the above questions have been taken care of.

The above planning method, when implemented by people who own the plan and want to see it happen, can produce higher chances of real actions and meaningful outcomes.

## **WORKSHEET TO PLAN A PROJECT – P. 1**

1. OUTCOMES: What do you hope to accomplish? Be specific.
  
2. WHEN WILL THE OVERALL PROJECT BE COMPLETED? \_\_\_\_\_ (target date)
  
3. STRATEGY: How does this work relate to and/or further the organization's purpose, guiding principles and strategic directions?
  
  
4. ACTION STEPS: For each step needed to accomplish the work identify:
  - i. What step needs to happen?
  - ii. When will it need to be done by? \_\_\_\_\_
  - iii. Who is responsible for this part of the work? \_\_\_\_\_
  - iv. Who will they communicate progress to?

*(Use the table on the next page to list each action step and related information)*
  
5. MEASURING SUCCESS: What will "success" likely look like? How will you recognize it if it happens? This is about how you will measure results. List criteria and markers below:
  - a.
  - b.
  - c.
  - d.
  - e.
  - f.
  
6. ACCOUNTABILITY:
  - a. Who is the lead person chairing/coordinating this project?  
\_\_\_\_\_ (Name)
  
  - b. Who does the leader/group report to for oversight?  
\_\_\_\_\_ (Name)

**WORKSHEET TO PLAN A PROJECT – P. 2**

| ACTION STEP | PERSON RESPONSIBLE | DATE NEEDED | REPORT OUTCOME TO WHO? |
|-------------|--------------------|-------------|------------------------|
| 1           |                    |             |                        |
| 2           |                    |             |                        |
| 3           |                    |             |                        |
| 4           |                    |             |                        |
| 5           |                    |             |                        |