

**First United Methodist Church
Sarasota, Florida**

**Board of Vision and Implementation
September 2006**

OVERVIEW

In June 2005 First United Methodist Church of Sarasota made a decision not to accept a developer's offer to move the church out of downtown Sarasota. This decision brought with it the realization that First Church would have to revitalize and grow if it was to meet its mission. A plan had to be developed to unite staff and laity in common result-oriented purpose.

By February 2006, the Church Council had endorsed a Board of Vision and Implementation (BVI) composed of 20 staff and lay leaders to produce a plan of action. A professional Percept study of the congregation and community within its reach was commissioned and became a valuable resource.

The BVI analyzed First Church strengths, weaknesses, opportunities and threats to devise Strategic Objectives and Desired Outcomes, assign Ownership, and set Time frames.

The Mission and Vision Statements were updated:

Mission: **To celebrate and share the joy of Christ's love**

Vision: **To be a dynamic growing church**

Five Strategic Objectives with Desired Outcomes were to be implemented within the time frame of the next 3-5 years for:

1. Worship and Programs
2. Leadership and Organization
3. Stewardship and Finance
4. Marketing, Communications and Image
5. Building, Grounds and Equipment

The BVI's Strategic Objectives and Desired Outcomes with research and professional aid will reinvigorate the church family. Examples (see complete text for detail of these and others):

- Plans and projections for three-years forward.
- Expand worship services, programs, and small group studies.
- Worship attendance grows at 20% per year to reach 918 average for Sundays in year five, 2011. Pledgers increase at same pace.
- Assimilation that welcomes and integrates members into church life.
- Empowered staff and lay leaders professionally trained and confident.
- Research-based marketing internally and externally.
- Accurate and accessible computerized congregation records.
- A 3-5 year financial plan integrated with stewardship.
- Congregational giving that completely funds the operating budget.
- Endowment giving that meets capital needs and retires debt.
- Refurbished and upgraded church facilities for added services, programs, and ministries.

Ownership was assigned for each of the Objectives and Outcomes with completion Target Dates. To assure the Objectives and Outcomes become reality, the BVI plan has four key maxims:

- Specific Outcomes to accomplish.
- Time frames to meet.
- Periodic measures and evaluation.
- Ownership assigned and accountable for results.

The BVI commits to work in partnership with the pastors, the ministry teams and be accountable to the Church Council.

With the full support and participation of the entire church family using their gifts and talents, it is crucial that we achieve these Strategic Objectives and Desired Outcomes for First Church.

We will follow the Lord into the future to celebrate and share the joy of Christ's love.

Board of Vision and Implementation Members
Jerry Francis, Chair
September 2006

Board of Vision and Implementation

September 2006

PART 1

BACKGROUND

A realization came with the congregation's decision in June, 2005 not to accept a developer's offer to move the church out of downtown Sarasota:

Though the vote affirmed the congregation's mission from her historic site, the status quo would not sustain the church to serve her mission.

A "new urbanism" growth in condominiums and office construction was well underway bringing new businesses, new residents, and more downtown workers. This historic church, Sarasota's first, was now confronted with change on all sides.

To prosper here in Christian service and worship, every aspect of First Church must be reviewed, evaluated, and adjusted where necessary to the new downtown Sarasota and the needs of residents within its reach. Growth initiatives needed to be devised and achieved.

The decision to stay required the congregation to face this new reality. A "grand plan" was needed that unites staff and laity in common result-oriented purpose.

Major such planning efforts in the past were undertaken to address challenges (declining membership and finances, etc.) and recommended direction forward:

1. The Brazelton Report (Bridges to Tomorrow) 1987 – Don Roberts, Chair.
2. The Joel Committee (Vision 2000) 1993 - Ray Grills, Chair.
3. Long Range Planning Committee 1997- Tracey Jones, Chair.
4. The Burkholder Study, 2000 - a consultant's study

In addition, professional Percept Ministry Area Profile studies of the demographics and ministry needs within reach of the church were commissioned in 1991, 1993, and 1999.

Each of these studies merits the reader's review for the context of this BVI report.

All four of the internal plans and the external Percept surveys laboriously consumed the time and talent of dedicated church leaders who recognized a pressing need to revitalize. Each effort made significant recommendations, though very few were put into practice.

From the 2000 Burkholder study: "with ...declining membership and attendance, an aging congregation [and structure], and budget struggle [there arose] a real fear of what may happen to the church if something doesn't change." However, consistently missing in the aftermath of each report was full support with measurable follow through and accountability.

With the decision to stay in the new downtown "Pineapple Square," and the changing external environment around the church, as well as more than a decade of leadership's struggle to reverse internal decline, the 2005 commitment to remain at 104 South Pineapple demanded a renewed effort to establish a plan of action that would be adopted and actually executed.

By the fall of 2005 a "Blue Ribbon" committee was appointed and, after several sessions, in February 2006 evolved into a council-approved smaller committee of staff and lay leaders formed the "Board of Vision and Implementation" (BVI). The BVI began meeting in earnest. Its work is the focus of the remainder of this report.

Board of Vision and Implementation September 2006

PART 2

PROCESS

I. **Board of Vision and Implementation Established.**

At the November 2005 Church Council meeting, Reverend Art McClellan made an initial recommendation to establish a Board of Vision and Implementation (BVI.)

One of the first assignments for the Blue Ribbon Task Force had been to review and recap prior Long-Range Planning reports. The discovery that "...The most notable and discriminating factor from this assignment was the lack of an implementation strategy following each group's findings," led Reverend McClellan to recommend that the "...Church Council establish an ongoing strategic planning and implementation initiative." [emphasis by Reverend McClellan]

The Board of Vision and Implementation (BVI) would be accountable to the Church Council, with nine members nominated by the Committee on Lay Leadership, and would begin in January 2006. The Board's initial responsibilities would include:

- Design of an overarching Vision and Goal Statement for First Church using (1) the Blue Ribbon Task Force recommendations, (2) insights gathered from the pending *Percept Research and Study*, and (3) an analysis of existing church ministries.
- Specific recommendations to ministry teams to reach the envisioned goals.
- An ongoing responsibility to ensure the implementation of the Visions and Goal Statement while working closely with First Church's Ministry Teams.

In January 2006, Reverend McClellan presented a motion to the Church Council to create the Board of Vision and Implementation. The Church Council approved the creation of the Board of Vision and Implementation with specific responsibilities, reporting structure, and expectations:

- Comprised of 9-15 lay members, with rotating classes nominated by the Committee on Lay Leadership. Nominations were to be presented for approval at the next scheduled Church Council meeting and to the Charge Conference, thereafter.
- Accountable to the Church Council, with all vision recommendations presented to the Church Council for deliberation prior to seeking the Council's approval. This meant that recommendations would be presented at one Church Council meeting, followed by a vote on the recommendations at the subsequent Church Council meeting.
- Responsible to partner with the Council and pastors to discern, initiate, and evaluate the vision for the ministries of First Church.
- Responsible for designing an implementation strategy to communicate the discerned vision throughout the congregation and our ministry team structure.
- Ideally, the BVI would enhance communication and interaction between the corporate vision and goals set for First Church, and the unique vision and goals set by each ministry team.
- The Council recommended that the BVI begin their deliberations by studying the Blue Ribbon Task Force compilation report and the *ReVision* Campaign report.

The Church Council approved Committee members, as recommended by the Committee on Lay Leadership, at the February 2006 Council meeting. Committee Chair, members and classes are:

Chair: Jerry Francis
 Secretary: Karen Maiden

<u>Class of 2006</u>	<u>Class of 2007</u>	<u>Class of 2008</u>
Ralph Blincoe	Vonda Johnson	Margaret Butler
Lottie Crawford	Tom Pruitt	Russ Copeman
Dara Hunter	Steve Pulliam	Sandy Grimes
Paul Thorpe	Rod Warner	Tom Troublefield

Ex Officio Members

Elizabeth Goldstein, Music Director
J. Don Johnson, Lay Leader
Donna Maynard, Director of Lay Programs
Reverend Art McClellan, Pastor of Celebration Service
Reverend Jim McWhinnie, Senior Pastor
John Pennington, Chair, Church Council

II. Board of Vision and Implementation Process

During planning meetings, BVI Chair Jerry Francis and Pastoral Liaison Reverend Art McClellan decided to use a strategic planning process to develop a Vision and Goal Statement and related strategic objectives, target dates, and desired outcomes.

Strategic Planning Workshop March 11, 2006

Two professional facilitators, Drs. Roger and Phyllis Barry, without connection to First Church were enlisted, provided their services at no cost to First Church. An all day retreat to begin the strategic planning process was held March 11 at the DaySpring Episcopal Conference Center in Ellenton, Florida. As with any strategic plan, the BVI strategies, objectives and desired outcomes would cover a 3-5 year period. After an analysis of the Strengths, Weaknesses, Opportunities, and Threats (SWOT), the BVI was poised to produce a strategic plan.

Eight Weekly Planning Meetings and Second Workshop

The BVI held weekly meetings beginning March 22. While much was accomplished in the weekly meetings (which were 90 minutes in length), Board members decided that the urgency of their work required another full day retreat to complete the draft strategic plan, objectives, and outcomes.

Their second retreat held June 10, 2006, was facilitated by Dan Beeman, Ph.D., a member of a Tallahassee United Methodist Church. Dr. Beeman has 25 years experience in organizational development and quality management and donated his time and expertise for the retreat.

The BVI concluded its initial work July 12, 2006.

Three to Five Year Plan

During its research, the BVI found that First Church planning is focused on the short-term, one year out, with no long-term plan that could be found. Short-term planning provides very narrow programming and budgeting, with little or no room for adjustment as the year progresses. The BVI also noted that First Church uses a calendar year basis for planning and budgeting.

An organization must undertake long-term planning if it is to succeed. Long-term planning provides a vision for the future while short-term planning provides a snapshot of the present. The BVI agreed that First Church must approach planning from a long-term basis if it is to thrive and continue as a viable religious center.

The mission, vision, strategic objectives, desired outcomes, and target dates would span a three to five year period to provide a long-range plan and focus on the future. The entire plan – mission, vision, strategic objectives, and desired outcomes – is a living document, i.e. the BVI would review plan components on a regular basis, at least annually, to ensure that the plan is extended beyond 2009-2012 and to ensure currency of the plan.

Data Driven Decisions

BVI decisions were driven by data and statistics, rather than personal feelings. Various data were reviewed along the way, including the Percept Context 2006 Study and analysis, First Church attendance and financial data for the period 1990 – 2006.

III. Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

After a review of the existing Church Mission and Vision Statement, the BVI Team agreed to table rewriting of the mission and vision statement to a later meeting. The Board then conducted a review of Strengths, Weaknesses, Opportunities, and Threats (SWOT) internal to the Church. After brainstorming, the team narrowed the SWOT items down to the critical few, which then served as the basis for strategic objectives.

The team identified four Strengths, eight Weaknesses, eight Opportunities, and four Threats, which would form the basis for the Strategic plan, Objectives, and Desired Outcomes (SODO).

Strengths

- Traditional worship
- Early care program
- Music program
- Mission work

Weaknesses

- Image (first impression)
- Internal/external communications
- Lack of implementation of new plans and follow-up goals
- Need to empower lay leaders
- Balance of power
- Lack of staff
- Sanctuary not configured well
- Lack of direction – spiritual growth

Opportunities

- Create an alternate worship
- Identify and define marketing
- Change organizational and fiscal programming year
- Make presence known in downtown
- Become a front door church (appearance)
- New programs
- Lay leadership empowerment – untapped talent
- Chance to actually implement plan

Threats

- Parking access during construction
- Failure to budget beyond one year
- Lack of spiritual growth
- Failure to empower lay leaders

These critical few items identified from the SWOT were grouped into several categories and used as the foundation for writing strategic objectives:

- Organizational
- Leadership
- Financial
- Worship
- Programming
- Communications and Image
- Plant and Equipment

These categories were combined to produce the final strategic objectives contained in Part 4 of this report.

IV. Board of Vision and Implementation Progress

By July 12, 2006, BVI had drafted a revised Vision and Mission statement (*see Part 3*), Strategic Objectives and Desired Outcomes (SODOs) with timelines, and identified owners of the various SODOs (*see Part 4*).

Identification of owners and timeline development prepares the Church Council, Ministry Team Leaders, and Church Staff to move First Church with planning, programming, and outcomes to build on our strengths, meet identified weaknesses and threats, and capitalize on the opportunities to move First Church forward.