

Future Planning Guide 1





Leadership and Ministry Development Resources

Future Planning 1 Guide

Unity Worldwide Ministries
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For tomorrow belongs to the people who prepare for it today.
African Proverb

Acknowledgements

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Leadership and Ministry Development Resources

Welcoming System Guide

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Future Planning 1 Guide

Future Planning 2 Guide

All resources available in 2015 as downloads at
www.UnityWorldwideMinistries.org/Guides.

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Introduction and Intention

You are embarking on a journey that will allow your ministry to grow and become more conscious in its decisions and activities. The importance of an inspiring and guiding future plan cannot be overstated. For example, one of the field-testing ministries dreamed of bringing *Be Peace* (<http://bepeace.org/>) to their spiritual community and the public school system. They included this goal in their Future Plan and as a result, the dream became a reality.

Both *Future Planning 1 and 2 Guides* serve to support you and your spiritual community in incorporating the best standards of practice for creating your own Future Plan. The intention of these guides is to provide an integrative, inclusive and conscious process that generates a sense of deep connection for your members and an exciting, motivating Plan for the future of your spiritual community. In coming together to implement the Plan, members will have opportunities to grow, contribute and serve in meaningful ways.

Your Future Plan is more than a document; it is a living guide that will be modified as new ideas and possibilities occur. It represents the consciousness held within the spiritual community as they carry out the actions noted that support the mission of the ministry.

This future planning process supports an integral, whole systems plan of development that consciously and systematically unfolds spiritual and emotional maturity within the membership. It engages more people in focusing on their shared future, which leads to more involvement when it is time to implement the Plan through serving (see Unity Worldwide Ministries' *Sacred Service Guide* for more information at www.UnityWorldwideMinistries.org/Guides.)

Your Future Plan Becomes a Living Guide

By using the Future Plan as a guide, the energy from completing the process is sustained. Your ministry teams will refer to the Plan in their meetings to keep their role fresh in their minds and activity planning, as well as to celebrate successes. Leaders also refer to the Plan in their meetings and allow it to direct their decisions and activity planning. One field-testing ministry noted that the regular referencing of their Future Plan helped when people questioned if the ministry planned any inter-faith activities; they could show where this intention was written into the future plan and explain the current progress. Another ministry commented that one person chose to become a member when they saw that one of their passions was part of the future plan.

Using Your Future Plan to Focus and Guide Your Activities

Here are some other examples of the results the field-testing ministries experienced from using their Future Plan to focus and guide their activities and fulfill their dreams:

- Adopting a mission and vision statement has produced a high percentage of service-minded individuals involved in some form of volunteerism. Almost half of the people attending Unity Spiritual Center of North Idaho are involved in sacred service within the ministry or in the local community or support global movements.
- Within two years of complete their future plan, Unity of Panama City was a leader in hosting community-wide inter-faith events that grew into the Inter-faith Council of Panama City; which had been a long-held dream until their future plan guided them into action.
- Unity of Melbourne sold their building and bought a new building once they determined one of their goals was to have more space, especially for the Youth and Family ministry.
- Unity of Fairfax had two licensed Unity teachers (LUTs), yet required more to meet their congregation's desire for more classes. Five years later, they had 5-10 congregants who are working toward becoming LUTs.

What's your dream? Let's find out!

If you dream it, you can do it. ~ Walt Disney



Getting the Most Out of the Future Planning 1 and 2 Guides

The *Future Planning 1 and 2 Guides* are an aggregate of best practices designed to support **any size ministry** in creating a Future Plan together. These Guides provide a clear overview of the future planning process, step-by-step guidance and specific examples from successful experiences in the field-testing ministries.

Ministry Size Adaptations: the complexity of your Future Planning process will ultimately depend on many factors, including the size of your ministry.

If you are a **family or a small pastoral-sized ministry, it will be best to begin with the *Future Planning 1 Guide, Step 1***, following the guidance given for a small ministry. For all size ministries, the steps in the process will take some time, yet they will be engaging everyone who chooses to be involved in your ministry, building community and passion. **Give yourself as much time as you need to complete the work of Step 1 and Step 2 before moving on to *Future Planning 2 Guide*.**

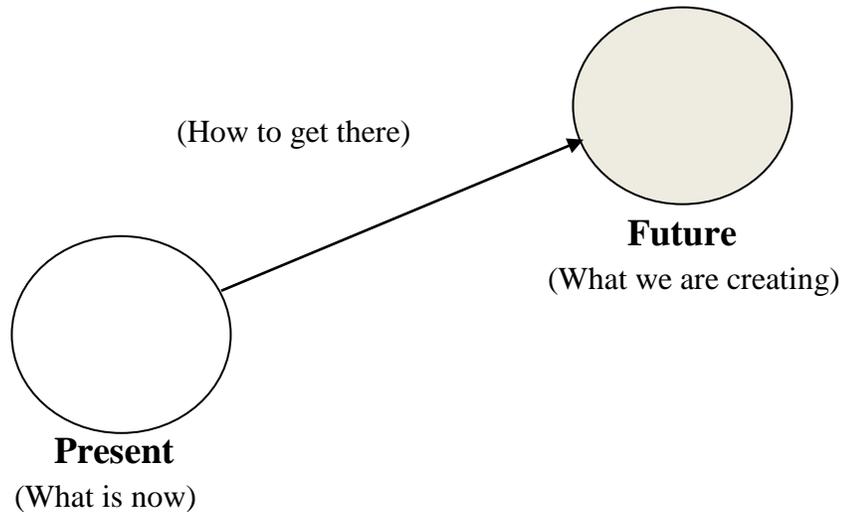
It is also possible to begin your future planning process with *Future Planning 2 Guide*. Before choosing this option, we recommend reviewing the steps and materials included in this *Future Planning 1 Guide*.

It is strongly encouraged that you consider have a **trained facilitator** (Unity Worldwide Ministries' Ministry Skills Team or a local professional) who can objectively guide the congregation through the different phases.



What is Future Planning?

A Future Plan is the result of a process to identify (1) your present situation (“what is”), (2) your driving vision, mission and core values, (3) the intended future outcomes and (4) the goals and steps to achieve these outcomes.



A ministry that is growing and hopes to sustain growth needs a set of strategies to guide it. This sets a common intention for your future and allows for program development and building a shared understanding of the steps and roles required to achieve the desired outcomes.

Note: *Future Planning 1 Guide* is designed to support you in identifying the Present (what is now). The results are the basis for the *Future Planning 2 Guide*, which defines the Future (what you are creating and how to get there).



Benefits

Let's be honest. Many people have been involved in at least one future planning process with one or more of these negative results:

- One person's agenda ran over everyone else's ideas
- It was a long, painful process that most people wanted to escape
- It was a plan that was shelved once it was written, so it was never implemented

However, future planning *can* be engaging, meaningful and powerful. When it is well managed, the process and results can be life changing for a ministry and its membership. Here are some of the many benefits:

- Future planning is a tool you can use to change from "reactive to creative." **You** plan and design the future. It stimulates creative thinking about the future of your ministry.
- It is a way to foster team building by using an inclusive process. All the stakeholders are involved in many of the steps of the planning process, which allows everyone to be heard. The result is a greater acceptance and ownership of the final result.
- Research from the Amherst Wilder Foundation has consistently shown that organizations with a future plan outperform those without one.
- Future planning can:
 - Include recent research on the Millennial generation and other spiritual seekers
 - Stimulate ingenuity and new approaches
 - Increase everyone's investment in the ministry's future
 - Develop a vision that inspires everyone
 - Clarify values that guide decisions and behavior
 - Provide a framework for decisions
 - Align the ministry's vision, mission, values and actions
 - Guide teams in their planning and actions
 - Allow the spiritual community to observe and celebrate progress

While the ultimate goal of the future planning process is to develop a plan, the real value of the exercise often lies in the process itself. It engages stakeholders in the ministry by providing the opportunity to learn more about the organization, to share their perceptions of its current circumstances, and to discuss critical issues affecting the community in the future. The process should be designed to generate decisions arrived at by consensus. This approach encourages key stakeholders to believe in the ministry's vision of the future and increase their commitment to achieving it.

What Is Future Planning?

Simple Overview of Entire Future Plan Process

Unity Worldwide Ministries' *Future Planning 1 Guide* and *Future Planning 2 Guide* cover the following:

Future Planning 1 Guide covers steps:

1. Commit to planning and get organized.
2. Identify the present situation (what is).

Future Planning 2 Guide covers steps:

3. Set future direction (vision, mission, core values, outcomes and actions).
4. Implement the plan as a living, guiding document.
5. Keep the vision, mission, core values and action plan alive.

For step 3, we strongly encourage you to have a **trainer facilitator** (Unity Worldwide Ministries' Ministry Skills Team or a local professional) who will choose the approach.

Creation: The original plan of an idea in Spirit.
Charles Fillmore, *Revealing Word*



Steps in the Future Planning 1 Process



Step 1: Commit to Planning and Get Organized

For future planning to support a thriving ministry, a majority of the stakeholders need to be invested and willing. It will **not** work if:

- A dynamic leader sets the tone and does all or most of the visioning.
- The community is too divided. When divided, a better plan would be to engage Unity Worldwide Ministries' Ministry Skills Team to create greater cohesiveness.
- The board and staff are not invested.

Future planning is best when there is dedication to the process and available resources to devote to the process. It is an exciting time to develop the thoughts, words and pictures that will propel you to a new future.

Develop a Future Planning Team

This team of stakeholders (meaning interested and key individuals) are representatives of staff, board members and interested members. They will work together to plan the process, assign tasks and oversee the progress. This team will also decide if an outside facilitator is needed, identify the best facilitator candidate and assess if the needed resources can support the process.

In a small ministry, the Future Planning Team may consist of the minister/spiritual leader, a Board member and one congregant. A description for the Future Planning Team and its role and accountabilities is found in Appendix One, pg. 28.

Create a Plan to Plan the Future

Some of the decisions that need to be defined include:

- How many years will the plan cover? In the past, organizations typically looked five to ten years ahead. Today, it is usual to consider three years in the future.
- If you use an outside facilitator, what do you expect of them? Are they to identify the process or manage the process? If you do not require an outside facilitator, is there a skilled and neutral member of your spiritual community that can support you in this process? If so, add them to the Planning Team.
- What are the core components and when do you desire each to be completed?
Two tips:
 - Keep this moving so it does not drag on and lose excitement
 - Know that some stages will take longer than you envisioned, so allow for flexibility
- What stakeholders do you want to engage at which points in the process?



Step 2: Identify the Present (What Is)

This step can be an engaging and re-energizing stage for your spiritual community.

The goals of this step include:

- Making the operations and status of the ministry more transparent to congregants
- Involving lay members in an “owner’s” perspective of the ministry
- Collecting a picture of “What Is” to later compare to the emerging picture of what is wanting to be created
- Helping to formulate an understanding of the “discomforts” and other signs of emergent growth and evolution seeking to transcend the current paradigm of ministry.
- Assisting in identifying the degrees of integrity among the many facets of Leadership, Culture, Social Dynamics, and Structures/Processes of the community.

In taking Step 2, you are setting in motion a powerful process with two major tasks:

Task 1: Conscious Conversations

The Conscious Conversations process involves reaching out and connecting with former and current participants in your ministry in a way that is loving, open and accepting. In these Conscious Conversations, people share what they value in your spiritual community and what would help them be more connected. The feedback from these conversations will yield vital information from which the ministry can plan their future.

Task 2: Mapping “What Is”

The Mapping “What Is” process involves mapping the current ministry offerings. With this data, the entire community can evaluate what they want to retain as well as envisioning what they desire to create.

You will need a group of people to implement this step and its two tasks of **Conscious Conversations** and **Mapping “What Is.”** This group may be just your Future Planning Team (in a small ministry) or the Future Planning Team may wish to create a separate task team (in a larger ministry). A description of the Future Planning Task Team and its roles and accountabilities can be found in Appendix One, pg.29.

The remainder of this guide explains how to carry out Tasks 1 and 2 of this step.

Step 2/Task 1: Conscious Conversations

Overview

What people are giving attention to and talking about creates the culture and the boundaries for what is possible.

Creating and sustaining a thriving ministry requires an intentionally engaged community beyond the leadership and core supporters of the ministry. In this part of the Future Planning process, the Conscious Conversations are a key factor in involving most of the congregation into a dialog where their input is heard and included. It is one strategy for developing a culture of “ownership” among members. It is also a way to invite greater participation and contribution.

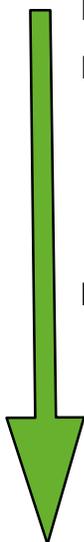
The task team is **trained to intentionally engage the community in a conversation** about the community, and to “Map the Heart” of what is moving, evolving and emerging in the attendees.

These conscious conversations may occur as one-on-one conversations or in small groups facilitated by two task team members. The conversation results are first shared within the task team that works to identify the themes. The task team then reports the themes back to the entire spiritual community.

A conscious conversation shifts a communication to a deeper, more meaningful level. While every level of conversation is useful, there are times when it is important to understand what is at the heart of what is being expressed.



3 “Levels” of Conversation



Level 1 - Greetings; pleasantries; information exchange.

Level 2 - Responding to requests; complaints; demands; questions.

At Level 2 we see people responding at the content-level of the verbal exchange. This might show up as explaining, defending, or simple acceptance of the statement.

Level 3 - Discovering what is at the heart of what the person is expressing.

This kind of intentional conversation seeks to understand and connect with the person at a deeper level. This approach **goes underneath the surface to identify the core underlying needs or interests.**

An Example of a Level 3 Conversation

Imagine a person saying, “We need a choir.” To invite a deeper understanding, the facilitator/listener might respond:

- “Tell me more about that... why is a choir important to you?”
- “What would having a choir fulfill for you?”
- “Are you saying something is missing for you in your church experience?”
- “How would having a choir shift things for you?”
- “Have you ever had a choir at your church in the past? Tell me about it.”
- “You said you sang in a choir. What was that like for you? How did it make you feel?”

In **Level 3 conversations** we want to *align with the person’s deepest and most authentic need* and shift attention to that deeper level.

We identify, acknowledge and reinforce what is moving within them at the core, and then invite an exploration of the ways the person might actively participate to meet that need.

- “You enjoyed choir before because you sang and felt good about serving ... there are many ways to serve and feel fulfilled in contributing”
- “While we do not have plans for a choir now, I am very interested in helping you find the way to deeply connect with community here.”

Principles for Conscious Conversations

What people are giving attention to, talking about, and thinking is the *ground from which culture emerges*. The very act of systematically engaging the community in deeper level conversations is itself an intervention. The spiritual practice of deepening the conversation will result in shifting the ministry's culture and then likely the energy, form, activities, and the impact the ministry will have on the world.

Principle #1: Acknowledge what the person said *before* shifting to a deeper conversation.

Everyone desires to be heard with respect. This is especially essential if the conversation is to continue and deepen after a superficial response. **First acknowledge what the person *said*.** Then explore what may be behind their comment (the deeper meaning).

Examples:

- “Yes, thank you for that comment. Let’s talk more about this.”
- “Okay, I hear that ____ and tell me more.”
- “You said you used to attend church more. Are you saying something is missing in your experience here? Tell me more about that.”
- “You said you liked singing in the choir. How was that fulfilling for you?”



Principle #2: Move past complaints to understand the heart of the underlying desire the person wants fulfilled through their spiritual community.

If presented with statements of complaint, request, questioning, or concern... seek to understand the *heart of the underlying desire*. What are they wanting and expecting from spiritual community that is missing for them?

Avoid the trap of spending time explaining or defending. This is the time to find what is moving *inside* of them. Accept the surface request for consideration and quickly move to discovering what would fulfill them, where the ember may be smoldering within them for becoming involved in building programs, services, community building, or outreach.

Example:

“I will make a note of your question/concern. For now, let’s talk about how addressing this would shift things for you.”



Steps for Holding Conscious Conversations

Step 1—Holding Conscious Conversations

The Task Team is Selected and Informed of Their Role

The group holding Conscious Conversations may be your Future Planning Team (in a small ministry) or the Future Planning Team may wish to create a separate task team (in a larger ministry). If a separate task team is to be used, members of the task team are selected to gather important information about the current state of the ministry in the minds and hearts of its members. In this phase of their work, the task team members are informed of their role and the steps they need to fulfill:

1. Define, with the Board of Directors or Future Planning team, all the potential members to be invited to a Conscious Conversation individual session or small group. Divide the list among the task team members.
2. Create and implement invitation strategies to maximize attendance.
3. Review and adapt the questions for the conscious conversation small groups. This may involve input from the ministry's leadership.
4. Train task team members and practice the skills of facilitating conscious conversations.
5. The conversations are held and results are captured in writing.
6. The themes from all the conversations are compiled.
7. A variety of ways to report the results to the congregation are identified and implemented.

Step 2—Holding Conscious Conversations

Define Who Will Be Invited to the Conscious Conversations

The goal is to include current members and those who had been attending over the past few years yet may not be participating. All parts of the community need to be represented to the greatest extent possible.



Step 3—Holding Conscious Conversations

Create and Implement the Invitation Strategies

While an open invitation may be done on several Sundays and via email, it will require some creativity and more effort to engage as many people as possible. One field-testing community held the Conscious Conversations in February and branded them as “Heart to Heart” talks; their mailed invitation built on the heart theme as did their Sunday announcements, newsletter notices, and other advertising methods. The task team wore a special nametag on Sundays in the shape of a heart with the words, “Ask me about Heart to Heart!” Each community member is individually invited by a task team member to one of several conversations. Follow-up phone calls can help increase the possibility of members agreeing to attend.

Some helpful comments for the invitation/announcements include:

- “This is one opportunity to be a part of the larger conversation about what is moving in our community and the potential for the new Future Plan to support our growth and evolution to the next level.”
- “We want to create a space for all participants to speak to ‘Who have we come here to be’ ... as well as how you might see yourself linked with the ministry’s mission now, and possibly in the future.”
- “We will be bringing your sharing and perspective into the larger vision and planning process that the community is engaged in.”

Step 4—Holding Conscious Conversations

Review and adapt the questions for the conscious conversations

You will find some suggested questions below (pg. 19). However, every ministry should modify these to fit their own unique needs. The Board of Directors or Leadership Council may also have input. Several ideas to keep in mind are:

- Allowing members to share deeply and honestly so they feel heard and respected.
- Framing the questions to elicit what is working well and constructive ideas for improvement.

Some suggested questions for these one to one-and-a-half hour conversations are:

1. What do you perceive to be the mission of this ministry?
2. What would you say are the ways we are fulfilling our mission?
3. Personally, in what ways are you most fulfilled by our spiritual community?
4. What shifts or changes do you perceive could benefit our spiritual community?
5. Personally, what do you need/desire to become more fulfilled in our spiritual community?
6. Is there anything else you would like to express regarding our spiritual community?

Step 5—Holding Conscious Conversations

The Task Team is Trained and Practices How to Facilitate Conscious Conversations

Task team members attend a workshop to learn about conscious conversations. This includes practicing these skills with the team. Additional practice is held with their facilitation partner and a mock small group. A follow-up session allows for task team members to discuss what they experienced and to refine their knowledge and skills.

Step 6—Holding Conscious Conversations

Conversations are Held and Results are Captured in Writing

The task team members facilitating the one-on-one or small group conversations determine their roles in leading and scribing the results. A guide for facilitating, from setting the context to deepening the conversation, is in Appendix Two, pg. 32. A reporting form is also in Appendix Two, pg. 36, for taking notes during each session.



Step 7—Holding Conscious Conversations

Themes from the Conversations are Compiled for Later Reporting

After all the Conscious Conversations sessions are completed, the task team meets to discern the major themes for every question that was asked in each group. This is a synthesis of the raw data that highlights and summarizes the common ideas from all the small groups, which can be shared with the congregation.

The raw data may be retained in the center’s office in case it is needed for reference. Once the Future Plan is complete, the raw data can be discarded. However, the summary report is retained.

This completes the first task of the task team.

The next task is Mapping “What Is”. Once this second task is completed, a report of the results from both tasks will be shared with the congregation. Strategies for this report are at the end of the next section, Mapping “What Is,” pgs. 25-26.

This summary is vital data to consider when designing the vision, mission, core values, outcomes and action steps of the Future Plan, as outlined in the *Future Planning 2 Guide*.



Step 2/Task 2: Mapping “What Is”

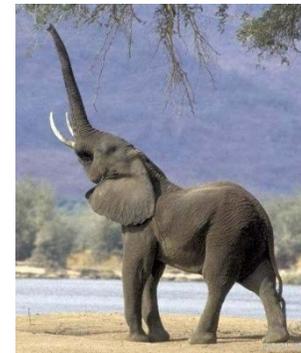
Overview

Before envisioning the future, a spiritual community requires a shared and accurate understanding of its present state or “What Is.” This is shared with the entire community so that all learn more about how things are with the elements that comprise the relative health and success of the community.

This is a powerful and transformative activity. There are three reasons for this:

- You **increase the membership’s coherence** regarding its accurate understanding of the health and well being of each of the explored elements. Everyone is on the same page.
- You **unveil the facts and the reliable indicators** that are (or are not) in place for you to evolve. In addition, you may discover old narratives about the community that do not match what is now emerging.
- You **involve many more members** than those engaged in leadership. This is a visible movement towards a “**mission-centric**” ministry.

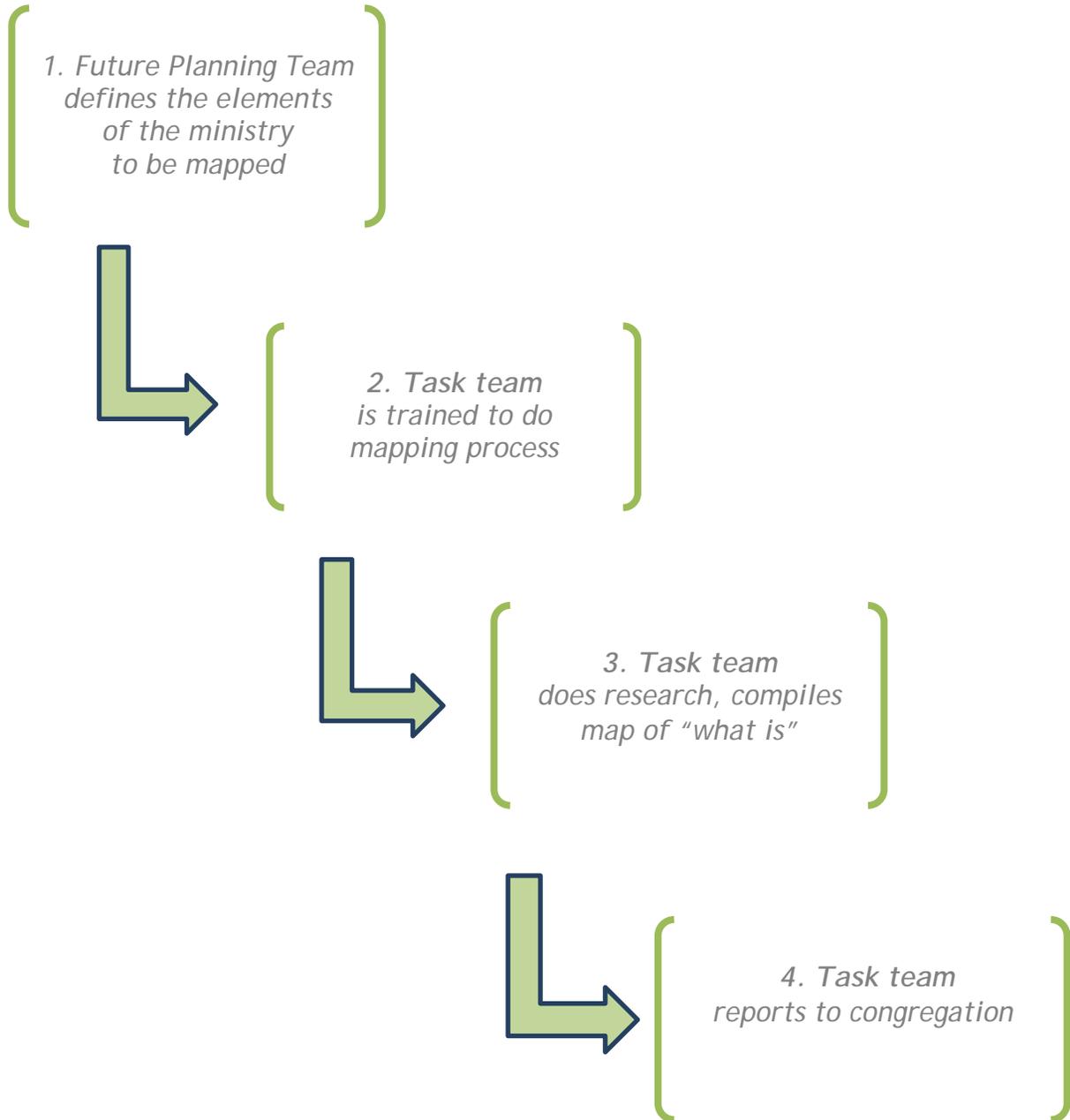
A useful metaphor for the wisdom of Mapping “What Is” is the story of the **blind men and the elephant**. In one version of this tale, a group of blind men each touch a different part of an elephant to learn what it is like. They then compare notes and are surprised by their varying conclusions since one felt the tusk, another felt the tail, another felt the leg and yet another felt the ear. Reality depends on our perspective and can vary from person to person. When we don’t have the whole story with all the viewpoints included, we can form narratives that block us from perceiving what may now be emerging and possible.



There is value in shining a bright light on the present state of the spiritual community in order to discern what is next in the ministry’s evolution and growth. Now everyone involved sees the elephant and its various parts. As a result, there can be a discussion of what to do with the elephant as we move forward.

As explained in Appendix Three, Future Planning facilitates many of the developmental shifts in the Thriving Ministry Model.

Steps in Mapping “What Is”



Step 1—Mapping “What Is”

Leaders Identify Areas to be Mapped

The ministries or operational areas are defined by the Future Planning Team* or Board of Directors. Some examples include:

- All Service/Ministry programs (list them)
- Attendance
- Education classes for members
- Classes offered to the public
- Music
- Facilities
- Affinity Activities (e.g. web site, mailings)
- Public Events/Performances
- Retail offerings (e.g. book store)
- Social Action Projects
- Giving/Contribution Programs
- Ministerial/Staff positions
- Communication tools/processes

There are sample charts in Appendix Four, pgs. 45-46.

** The purpose of the Future Planning Team is to bring together key leaders of the ministry to define the activities needed to achieve the Future Plan. This team can be led by the minister or their designee. See Future Planning Team Role Description in Appendix One, pg.28.*

Step 2—Mapping “What Is”

Task Team Pairs are Trained and Do Research / Interviews

As with Step 2/Task 1, Conscious Conversations, the group completing Step 2/Task 2, Mapping “What Is,” may be your Future Planning Team (in a small ministry) or the separate task team created by the Future Planning Team (in a larger ministry). If a separate task team is to be used, members of the task team are selected to gather important information about the current state of the ministry.

In this phase of their work, task team members are trained and work in pairs. The pairs meet with staff and leaders to collect data and ask three questions regarding a specific ministry or operational area within the spiritual community. Each pair may have three or more ministries or operational areas to research/interview.



The three questions to be asked for each ministry or operational area are:

1. What is it?

- What is the definition of this ministry or operational area?
- What is the philosophy or values related to this ministry or operational area?
- What are the specific goals or expectations for this ministry or operational area?
- Are there defined objectives for this ministry or operational area?

2. How is it doing?

- Specific trends in the ministry or operational area?
Attendance (three to five year trends)
Revenues (three to five year trends)
- Specific issues in the ministry or operational area?
What is going well?
What needs attention?

3. What is happening?

- What patterns do we see in this ministry or operational area?
- What lessons have we learned from this ministry or operational area?
- What is evolving to be called forth in this ministry or operational area?
- What in this ministry or operational area needs to be addressed in our future and operational planning?

See Appendix Four, pg. 42, for a form to collect this data.

Step 3—Mapping “What Is”

Task Team Assesses the Results for a Report

Ideally these interviews occur over a two or three month time span and the reports are collected. Then it is time for the task team to make sense of the information.

- What is working?
- What is emerging?
- What needs to evolve?

(Note that these are phrased to elicit constructive information. If your spiritual community uses Appreciative Inquiry, you could use that format to assess the collected data.)

Step 4—Mapping “What Is”

Ways to Report Results to the Leadership and Congregation are Identified and Implemented

The final step for the task team is to creatively report the results to the congregation in several formats (a Sunday Celebration Service, a written report, a community meeting, and/or a Power Point slide presentation, etc.).

A written report should be available when the community comes together for its next step, to envision their future (Unity Worldwide Ministries’ *Future Plan Guide 2*). Task team members help to recall significant results from Mapping “What Is” as they impact planning for the future.

Diverse Ways to Report

Your team knows your ministry and the degree of detail and sophistication the community members want to see in the team’s reports.

One ministry may create a “dashboard” set of ministry-performance indicators that reflect ongoing measurements. Whatever form your reports take, your intention is to create a clear, concise and honest report of the team’s findings. Some questions you might want to answer are: ***“How are we doing in achieving our Mission?” ... and “How do we know how we are doing?”***

Types of Summary Reports

The ***first summary report*** of the information gathered (in whatever format works for your ministry) is given to the Future Planning Team and Board of Directors from the task team.

A ***second summary report*** is to be shared with the spiritual community, as a whole, at a community meeting.

The field-testing ministries reported that an ***“entertaining and informative” approach is favored***. Skits, imaginative graphics and themes... work well to help to get across the results. You are only limited by your imagination on the creative approaches that could be taken. For instance, a game show format with “contestants” guessing answers to some questions about survey findings. One field-testing ministry used poetry, songs, skits and signs on the walls of the meeting hall to convey the highlights. To address some issues of concern, one task team used the song “The Hokey Pokey” to have a fun way to show what members felt needed to stay “in” and what needed to be “out.”

Key Points in Reporting

In the presentation back to the congregation, the Future Planning Team should be able to specifically answer the questions about “what’s next” with a time line and specific next events scheduled.

Once strategic intentions and objectives have been developed, the Future Planning Team’s ***gathered information*** can inform the ongoing planning activity as inputs to setting goals.

Summary

After completing the steps in this *Future Planning 1 Guide*, you will want to move on to ***Future Planning 2 Guide***.



Appendix One

Future Planning Task Team Role Descriptions

Future Planning Team Role Description

This team encourages key ministry leaders to be in sacred service to the whole spiritual community by planning and coordinating how to bring all members together to create their future.

Purpose: The purpose of the Future Planning Team is to bring together key leaders of the ministry to define the activities needed to achieve the Future Plan.

Led by: Minister or designee

Reports to: The Board

Accountabilities:

We count on the Future Planning Team members to:

1. Develop a schedule of activities and timeframes for completing the Future Plan.
2. Guide the Task Team in their activities and define what ministry teams or operational areas are to be mapped or complete the work of the Task Team themselves (in a smaller ministry.)
3. Determine which process will be used for creating the actual Plan (Future Guide 2).
4. Encourage engagement of the whole community in various planning activities as a way to foster greater ownership.
5. Communicate on a regular basis with the congregation to inform, build enthusiasm, and nurture a sense of shared completion.
6. Ensure publication of the completed Future Plan and dissemination of the plan in various ways (print, web site and other means).
7. Coordinate with the Sacred Service Council regarding implementation of the Future Plan and reports quarterly on progress.

Qualifications Required: Member, Team Leader or designee, Board Member, Credentialed Leaders, Staff, and Sacred Service Ministry Coordinator.

Time Required: 2 hours per month for up to twelve months for Future Planning Team meetings; along with congregation, up to four days for actual planning events during the twelve months.

Contact Information for this Sacred Service Position:

Team Leader: Paul Planner

Phone Number: 713-888-888; best to call 7:00-9:00 PM

Email Address: planningpaul@gmail.com

Future Planning Task Team Description and Roles

Definition

The task team is a selected group comprised of diverse members of the spiritual community representing various perspectives of the ministry’s culture (primarily strong congregation members as well as some staff, new members, age groups and some from leadership).

The size of the task team will depend on the size of your ministry. For a small ministry of up to 50 people, the Future Planning Team may serve the role of the task team. For a ministry of 50–100 people, the recommended size of the task team is 10–14 people, which may be increased for larger congregations.

Purpose

The purpose of the Task Team is to conduct the tasks of Conscious Conversations and Mapping “What Is” and summarize the results to be shared with the spiritual community.

Accountabilities:

We count on the Task Team to:

1. Intentionally engaging the community in Conscious Conversations about the ministry and Mapping the Heart of what is moving, evolving, and emerging in the spiritual community. This includes inviting people, conducting the small group sessions and reporting key themes to the entire community.
2. Collect information on the recent history and current characteristics of the spiritual community’s services/ministries, attendance and giving trends, staffing and board performance, vision, successes and tensions for evolution. This includes compiling the data into a report of “What Is” that is shared during Phase 2 of Future Planning.
3. Ensure the results of Conscious Conversations and Mapping What Is are utilized in Phase 2 of Future Planning.

Goals / Outcomes

- Facilitate transparency and share awareness of the state of the spiritual community
- Develop engagement and leadership capacity among congregational members
- Align culture around what they are there to be and do
- Educate members and invite/incorporate their input

Qualifications Required: Member, Team Leader or designee, Board Member, Credentialed Leaders, Staff.

Appendix 1— Future Planning Role Descriptions

Time Required: Task team members agree to serve for 12 months. (Some field-testing ministries found this was completed in less time.) The team will meet once a month. In addition, about four hours per month is anticipated to conduct Conscious Conversations and research to Map “What Is.”

Contact Information for this Sacred Service Position:

Team Leader: _____

Phone Number: _____

Email Address: _____

Appendix Two

Conscious Conversation Training Materials

Conscious Conversations Training Practice Exercise

Supplies: Paper and pencils for each participant

Directions:

Get into groups of two (or three) to practice this skill, remembering to take turns.

- Everyone writes down 3 statements they imagine they might typically hear in response to the question... **“What would you like to see happen in our ministry now?”**
- Take turns and ask the above question of each other. Listen to your partner’s initial response and then take the conversation deeper... past the more superficial levels. If you get a deeper response to start with, you should go deeper to join with the person at their level; supporting them in finding ways might they participate in creating what they sense would be genuinely fulfilling within them.
- Take 15 minutes for each group to get some preliminary practice in “Conscious Conversations.”
 - A facilitator or group member should let everyone know when they are half way through and remind everyone to change roles.
 - If you have groups of three, the third person can make observations of the two engaged in the deeper conversation.
- After all have had a chance to practice, share what you said or did to go deeper in the Conversation with the group. Take notes on what others said and did to use in the future.

Conscious Conversations—Extra Practice Assignment

Pair up with a Future Planning Task Team partner to plan and hold one small, “Conscious Conversation” session with other team members, meeting sometime before the next Task Team meeting. This will be an opportunity to practice *Conscious Conversation* skills, to fan the embers in congregants’ hearts, and to help build the community’s culture.

Use the Conscious Conversations Feedback sheets (p. 36) to summarize the material you gather in these conversations. Be prepared to summarize salient points at the next meeting. (See *Guidelines, p.33, and sample Agenda, p. 34, to help you*)

Guidelines for Conscious Conversations Meetings

- Partner with another person from the Task Team to conduct each session
- Predetermine the time and location
 - Sessions should last no more than 1-1½ hours
 - Select a location convenient to all (e.g. church, home)
- Determine and invite your participants, sending reminder notices in advance of the session
 - Group size of 7-10 is recommended for maximum opportunity for discussion
 - Inviting groups at least 2 weeks ahead of meeting is recommended
- Conduct the session
 - Predetermine the roles of each of the co-facilitators and have all supplies available
 - Properly set expectations and clearly state the reasons for the meeting (**See Small Group Agenda sample next page**)
 - Ensure you really get underneath what people are saying (aim towards Level 3 conversations)
 - Use the “Conscious Conversations” forms to capture the elicited information, feelings, thoughts, and reflections
- Compile the findings;
 - Keep details (for future use)
 - Pull out salient points and use when reporting back to entire Future Planning Task Team
- Report findings at next task team meeting

Sample “Conscious Conversations” Meeting Agenda & Questions (for a 1-1½ hour meeting with a group of 7-10 congregants)

Context setting

Clearly communicate the following to the members of your spiritual community, in advance of any information, invitations and introduction of “Conscious Conversations” sessions.

1. “This is an opportunity to be a part of the larger conversation about what is moving in our Community to support our growth and evolution to the next level.”
2. “We want to create a space for all participants to speak to ‘Who have we come here to be’ ... as well as how you might see yourself linked with the Ministry’s mission now, and possibly in the future.”
3. “We will be bringing your sharing and perspective into the larger vision and planning process that church leadership is engaged in.”

Some Session Guidelines (Shared with participants)

1. “We want to set an open, safe and loving space for **all to participate...** and we (facilitators) may guide the process when needed.
2. “We will pose some questions to enter a dialogue... and will facilitate the session so we focus on **gaining a deeper understanding of the interests and physical and spiritual needs of our community...**

Ask Questions and Seek Responses from All Participants

1. What do you perceive to be the mission of this ministry?
2. What would you say are the ways we are fulfilling our mission?
3. Personally, in what ways are you most fulfilled by our spiritual community?
4. What shifts or changes do you perceive could benefit our spiritual community?
5. Personally, what do you need/desire to become more fulfilled in our spiritual community?
6. Is there anything else you would like to express regarding our spiritual community?

Tip: Actively manage the diversity of styles. Remind all that “Some are more comfortable speaking up, others prefer to be asked. We may manage the conversation so that all may be heard.” And later... “We now want to invite those we have not yet heard from to share”)

Advise the group that their input will be shared, and that they will hear more about additional ways to continue and participate.

Sample “Conscious Conversations” Deepening Questions

- Could you say more about that?
- It is wonderful that you’ve had a good experience with this. What are some of the ways in which this has worked best for you?
- What is it you really like about _____ now?
- What is it about _____ that resonates with you?
- What is significant or meaningful about this for you?
- If we, as a ministry, could achieve this, what would it mean to you?
- How is our change (evolution, shift) feeling for you?

The following phrases can be used in building rapport so the speaker feels heard.

- May I ask you a clarifying question to be sure I understood you?
- Let me rephrase what you said to be sure I understand.

The following phrases can be helpful in ensuring an understanding that the Task Team is not a decision making body; they are information gatherers.

- What I am hearing is that you (feel/need/want) _____. Thank you for sharing that. We will share all the perspectives in the planning process.
- Our role here is to make sure every voice is heard. All of the comments will be included to create clarity around what is moving at the heart of our community. We are adding your input.

“Conscious Conversations” Feedback Form

(Use extra paper as needed for the Feedback Report)

Where was the Feedback gathered? _____

Total number of participants in session? _____

Pass the **Conscious Conversations Group Log** around to gather the names of participants and additional information requested in the sample sheet provided (p. 37) on length of attendance.

About what percentage were able to identify the current Mission of the ministry?

How is the ministry currently successfully fulfilling the Mission? (once you define Mission)

Personally, in what ways are you most fulfilled by our spiritual community?

Personally, what do you need/desire to become more fulfilled in our spiritual community?

Is there anything else you want to express?

Appendix Three

Thriving Ministry Model

The Thriving Ministry Model

An Integral Approach to Ministry Development

Developed by Rev. Dr. Gary Simmons

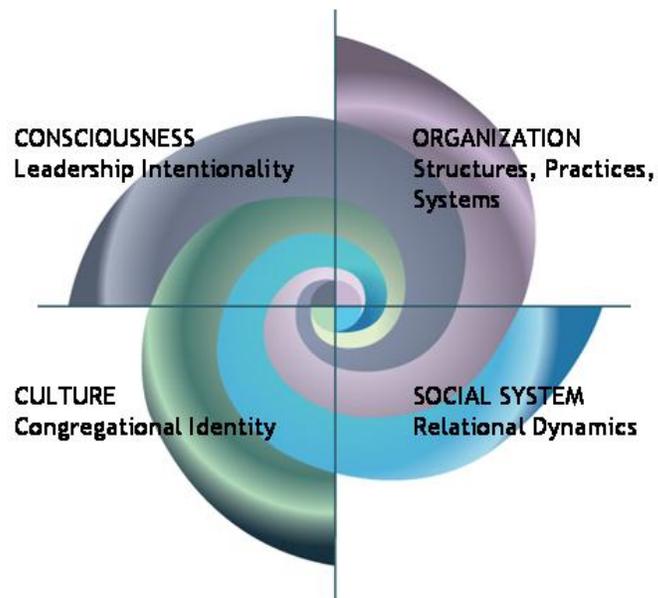
The Integral Framework

Based on the work of Ken Wilbur, this model is a holistic framework for understanding and working with growth and development issues. The focus is on inner emotional and spiritual maturity that leads to behaving in integrity with one's highest self (the Christ self).

The model emphasizes the whole of the ministry rather than reducing it to any one of its parts. A thriving ministry evolves all four quadrants which supports the whole system's growth.

Future Planning is a series of activities resulting in setting a direction for the ministry's next three years. It has the power to facilitate developmental shifts in each of the four quadrants of the model.

FOUR QUADRANTS OF MINISTRY



The Mapping “What Is” activities *support the developmental shifts* in each of the 4 Quadrants as noted below.

Quadrant 1

Consciousness/Intentionality

- Modeling **greater community-member involvement** in collaborating to *discover* and then help communicate to all – “What Is”
- Working alongside ministers, staff, and board members - emerging members have opportunity for development and greater involvement.
- Moving from situation-driven to purpose-driven

Quadrant 2

Culture/Congregational Identity

- Towards mission-centric model
- Resolution of past and re-forming identity in context of current imperatives.

Quadrant 3

Social System/Relational Dynamics

- Members **moving into ownership** of community
- Balancing care-giving bonds **with “effective team member” bonds**
- Move from “family” to **“egalitarian” social dynamic**

Quadrant 4

Structures/Practices/Systems

- Team-based approach
- Helping make explicit the current structures and allocation of resources and how the organization is performing.
- Communicating at multiple levels throughout the community

Appendix Four

Mapping “What Is” Forms

Mapping “What Is” Research Form

_____ Ministry or Operational Area to be Mapped	_____ Person Doing the Mapping
_____ Person Interviewed	_____ Person Interviewed

What is it?

- What is the definition of this ministry or operational area being mapped?

- What is the philosophy or values related to this ministry or operational area?

- What are the **specific** goals or expectations for this ministry or operational area?

- Are there defined objectives for this ministry or operational area?

How is it? (How is “it” working now?)

- Specific trends in the ministry or operational area?

Attendance? (five year trend)

Revenues? (five year trend)

- Specific issues in the ministry or operational area?

What is going well?

What needs attention?

Mapping “What Is” Ministry Categories (Sample)

Ministry Category	Date Assigned	Mapper(s)	Persons to be Interviewed	Date Completed
Sunday Celebration Services				
Adult Education				
Chaplain Ministry				
Y.O.U.				
Sunday School				
Hospitality				
Music Ministry				
Sound/Technical				
Bookstore				
Small/Affinity Groups				
Community Outreach				

Mapping “What Is” Operational Area Categories (Sample)

Operational Area Category	Date Assigned	Mapper(s)	Persons to be Interviewed	Date Completed
Finances/Giving/Contributions				
Facilities and Property				
Communication Tools / Processes				
Technology				
Public Relations				
Staff Structure				
Sacred Service Structure				
Board of Trustees				