

## **Five Step Visioning Process**

The process I use to clarify the church's vision and how it can/will be accomplished, usually involves five steps of activity. Visioning cannot simply be an 'event', it also needs to develop a strategic plan and provide the financial resources needed to accomplish it.

### **Step I**

The first step involved is for leaders to articulate a vision, put together a strategic plan to accomplish that vision and specify the financial need to incorporate the plan. This cannot be done from a general congregational meeting where people are simply asked to give their input if in fact there is no indication from leadership of what needs to be done. Most church people are followers and attend because they love the Minister and the overall ministry. They however are not usually involved in deciding what the current needs are and where the church should be going. It is not helpful therefore to ask a large general meeting, "What do you think?" unless there is a recommendation which makes the question, "What do you think about this?"

The leaders that make the initial decision re vision includes the Minister, the Board and maybe other leaders in the church that the Minister thinks will understand what is needed. Sometimes the first step here is a smaller group of key leaders who then present that recommendation to the Board.

### **Step II**

The second step is to produce a Survey/Questionnaire designed specifically related to what the Board is recommending. These Surveys are sometimes very short, one page, but one I did was 20 pages. Sometimes, when people develop the Survey is for them to say, "Well, if we are doing a Survey, it would be great to ask these questions as well" That cannot be done. The Survey needs to ask for response only from the recommendation made.

It is necessary to get a good response of Surveys, probably at least in the 50% range. What I usually recommend is to ask them to complete the Survey following worship on Sunday which results in a high response.

At the point that the Survey has been received there needs to be an analysis done. If the Survey is done in a sociological format, the analysis can be done on the computer.

### **Step III**

The third step is to invite a second level of response from the congregation in what I call a Focus Group format. The FG format is to divide the congregation into family groups where one couple/individual from the group will invite the rest of that family group to their home for a FG/coffee fellowship time. The chosen Host/Hostess then sends them a note/invitation, inviting them to come, following up with a telephone call to confirm their attendance. They host the group and provide coffee/tea and refreshments for them.

The presentation in the FG is made by presenters that are recruited and trained to do that. In some cases the Minister does the presentation to all the groups. The presentation consists of two things: an overview of the initial recommendation of the Board and the analysis of the Questionnaire/Survey received from congregation members. Following the presentation of these two issues, those who attend are then invited to respond in a Q/A session. This means that the Board will receive not just one response but a second response from the congregation.

The FG discussion needs to be recorded by a 'scribe' so that there is a record of that for further decision-making.

#### **Step IV**

The information received from the Questionnaires/Surveys and the FGs needs then to go back to the Board who made the initial recommendation. The Board then needs to clarify, revise and perhaps change the initial recommendation so that it is consistent with the responses received. The Board needs of course to decide on what should be done on the basis of their initial recommendation, given that they are the church leaders, and hopefully that will be consistent re the response that has been received from the congregation. This overall input usually results in solid approval.

#### **Step V**

At the point that the recommendation re the vision has been confirmed by the Board, there needs of course to be congregational approval received. Congregational approval may be mandatory but if it is not mandatory, it is still needed so that there will be overall support.

#### **The principles involved in this process are:**

1. Leaders need to lead.
2. There needs to be 'grass-level' input. Congregations struggle with support if they have not had any say on what is being proposed.
3. Step IV again is where leaders need to lead. When they have received the information from the Survey and the responses received in the Focus Groups, they then need to analyse it in relation to what they initially proposed. Some of the things heard from the Survey and the Focus Groups may not be seen to be needed given the proposed vision.
4. The final approval needs to be at three levels, "Where are we going?" (Vision), "How are we going to get there?" (Strategic plan), "How can we pay for it?" (Campaign).

**Note: It is important to put together a time-frame for this process. It usually will take from three to four months to complete. The established time-frame will build the momentum needed and ensure that the process will be done.**