



PATHWAYS

— *for fruitful & healthy ministry* —

A SUSTAINABLE FUTURE

www.gnjumc.org/pathways

A SUSTAINABLE FUTURE

■ *A strategy for sustainable mission and ministry*

Aspire and Envisioning God's Hope for your congregation's fruitful, vibrant and sustainable future.

Why engage in sustainability planning?

Healthy congregations must have the ways and the means to grow disciples to have the best potential for a vibrant future. This takes intentionality over time and a plan. Congregations that engage in this module will consider how their properties and their spending are an asset or a deterrent to their fruitful mission and ministry. They will then develop a plan to reduce the risk factors on a path toward longer-term health & sustainability which will support fruitfulness.

Who should engage in this module?

Following the Pathways Assessment, congregations with sustainability risk numbers of 2 and 3 should engage this module to develop a plan that includes action steps to further strengthen and engage for ministry and mission. You can address and strengthen in any or all five areas of sustainability: facilities, finance-revenue, spending, debt, and faithful folks. Note that there should be a sense of urgency that drives focused attention and intention to implement the important steps you outline.

Congregations with risk numbers of 4 and 5 may wish to engage in this module while they develop a pathway for disciple-making or work on community engagement. This module will help you focus on the areas of deficiency or risk highlighted in your assessment and develop a plan to address them over the next 2 to 3 years.

Biblical Grounding:

“Suppose one of you wants to build a tower. Won't you first sit down and estimate the cost to see if you have enough money to complete it?” Luke 14:28

The Ideal Team

Ideally to engage in the sustainability learning, growing, and planning sessions, a church needs to form a team of 6-8 people that includes all congregational leaders including a representative of Trustees, Finance Committee, Church Council Chair, and/or Lay Leader, with the pastor. Caretakers or those who deal with property issues of the facilities day to day and representatives of partner ministries or those renting space may be invited to future meetings.

What participants will learn?

- Biblical grounding to understand stewardship of facilities and other church resources.
- How to assess your church's assets, challenges, and opportunities.
- Organizing for change and impact.
- How to develop and implement strategic direction with a plan with steps toward a balanced budget.
- Assessing how your church holdings support the goal of dismantling racism.

Outcomes of

- An understanding of the challenges and opportunities that either hinder or help the congregation move toward a sustainable ministry model.
- Strategic Sustainability Plan with timeline and budget for the next several years.
- A strategic plan that will organize and guide the church and community working together to build on the assets and meet the challenges of the community.
- A culturally appropriate understanding of the demographics of the community and region around the congregation's facilities.
- An understanding of the community in terms of potential ministry partners and new methods needed to connect in ways that grow ministry, mission, and resources.

Supplemental Courses for Community Engagement through the Leadership Academy

- Debt reduction
- Stewardship planning
- Repurposing our buildings

Learning and Planning Design

The Sustainability Module has two models for learning, growing, and planning. A congregation may choose one or the other or develop a hybrid.

Model 1: 5-7 sessions of approximately two hours each with 3-4 hours of work between each session.

Model 2: 3-4 Saturday mornings of approximately 4 hours each session with 3-4 hours of work between each session.

| Training Session | Topic | Outcome | Assignments |
|------------------|--|---|---|
| Session 1 | Biblical and mindset grounding | <ul style="list-style-type: none"> • Clarity of purpose and approach | <ul style="list-style-type: none"> • Before the first meeting, have the team walk or drive through their neighborhood. (See exercise in appendix A) |
| Session 2 | Basecamp-Facilities, Finance, and Folks Assessment | <ul style="list-style-type: none"> • Assess congregational facilities and financial assets | <ul style="list-style-type: none"> • Do Properties, Income, Spending, Debt, Not Enough People Inventory • Video on Creative Tension holding https://couragerenewal.org/wpccr/democracyguide/v9/ |
| Session 3 | Comprehend to understand. | <ul style="list-style-type: none"> • Assessing your church's history and holdings. • What is the probability of future sustainability | <ul style="list-style-type: none"> • Create a team to evaluate cultural context. |
| Session 4 | Strategic Plan: vision and facilities need to support it | <ul style="list-style-type: none"> • Understand the role and elements of a strategic plan • A vision statement to provide strategic direction • What is needed to support the vision, facilities, assets, etc. | <ul style="list-style-type: none"> • Finance reports for Spending and Debt • YTD Budget • Last year's Treasurer's report • Fund Balance Report |
| Session 5 | Strategic Plan: SMART goals and action steps | <ul style="list-style-type: none"> • What are SMART goals • Concentrate on 2 -3 areas for future sustainability. • Write SMART 2-3 goals in each of these areas. • Write Action steps. | <ul style="list-style-type: none"> • Complete writing your SMART goals for sustainability • Complete writing your action steps |

| | | | |
|---|-------------------------------|---|---|
| Session 6 | Budget | <ul style="list-style-type: none"> • A budget to achieve goals and action steps | <ul style="list-style-type: none"> • Take initial steps toward prioritized work. |
| Session 7 | Transformation and evaluation | <ul style="list-style-type: none"> • How to communicate your plan to make progress • Steps to implement action and achieve goals | <ul style="list-style-type: none"> • Complete budget and evaluation plan and pass by Ad Board. • Set dates for monthly check-in • Identify who in your community might partner or need facilities like those of your congregation • Identify organizations and people you will partner with |
| Session 8 (6 months after goals are set and begun) | Keep Going | <ul style="list-style-type: none"> • Asset mapping exercise to identify potential partners as you leverage your facilities, look for cash flow streams, and develop sustainable ministry plan. | <ul style="list-style-type: none"> • Work through UMC steps for approval-Trustees, Finance, Church Council & if it meets cost % requirements then also the District Committee on Buildings and Location. |

■ **Session 1** **Grounding**

Biblical Grounding

The plans of the diligent lead surely to abundance, but everyone who is hasty comes only to poverty. Proverbs 21:5

In the opening chapter of the Bible as God finishes creation, he gives humanity the role to be stewards or caretakers. In the same way, as leaders in Christ’s Church, we are to use our varied gifts, together, to be stewards and caretakers of the local congregation. Being able to gather resources for local and connectional mission and ministry while also caring for facilities, staff and resources takes planning for sustainability.

Commit your work to the Lord, and your plans will come into focus/be established. Proverbs 16:3

How will you commit to the work you are doing in this Sustainability Module to God?

Take a moment to consider for yourself, then at the next Church Council/Leadership Board meeting ask people to answer this question:

On a scale of 1-10, with 1 being “shrinking” or “in decline” and 10 being “thriving”.

Where on this scale is your local church’s ability to sustain a vibrant ministry, keep the buildings in full repair and up to date, and cover the expense of ministry?

Do not be deceived: God is not mocked, for whatever one sows, that will he also reap. Galatians 6:7

Sustainability is a concept widely used in ecological circles to reflect upon the impact of human development on the environment. Broadly speaking, for development to be sustainable it needs to have minimal negative impact on the environment. In a broad sense, sustainability focuses on meeting the needs of the present without compromising the ability of future generations to meet their needs. For a congregation we might add, for a congregation to be sustainable, it needs to function at a defined level of spiritual and social well-being indefinitely.

What is your congregation sowing? How can you work to sow and harvest in the coming years?

Mind-set Grounding:

Prior to your gathering, take some time to walk or drive through your neighborhood. Observe deeply, with “fresh eyes” A guided prayer walk/drive might be a beneficial way to partake in this activity (Appendix A).

In teams of 2 or 3. Write down and note what you observed.

- a. Are they seeing anything that surprises them?
- b. Were they able to notice anything while walking that they might have missed if they were driving?
- c. What has changed over the last year, what has changed over the last five years?
- d. What does that tell you?
- e. What are signs that God is at work in the neighborhood?
- f. What feels familiar or strange? Safe or dangerous? Friendly or hostile?
Happy or sad? Pleasant or uncomfortable?

Outward Mindset: See, Adjust, Measure

SAM is an acronym we can use to refocus our efforts and get us back into an outward mindset.

- S- See others: The first step to seeing others is seeing others' needs, wants, desires, or challenges. Then ask lots of questions and get really curious. What did you SEE?
- A- Adjust efforts: Take all of the needs and objectives into account and adjust efforts to assist. What do you need to ADJUST?
- M- Measure: Hold yourself accountable, MEASURE the impact as you live into your new understanding of the community.

Throughout this process it is important to consider the following:

What do you **See**?

Who are you, the congregation, your neighbors?

How does what you see impact you and the ministry needed from your congregation?

How might you **Adjust**?

Are we developing the church's facilities for your present size and community needs?

Do we need to adjust the way you worship, minister, and relate to your community?

What are the opportunities and challenges?

How will you **Measure**?

How will making these adjustments impact your church and your community?

As a follow-up, ask the community if you have been helpful and gauge your impact.

■ **Session 2**

Basecamp: Facilities, Finance, and Folks Assessment

As with any expedition, whether climbing Mt. Everest or developing and delivering ministry and mission to a local community there needs to be a base camp where supplies are stored, where people can gather, rest and strategize and from where resources are deployed. For the church, these are our properties and facilities, our finances, and our people.

This module will allow you to work on a plan to care for your “basecamp” for ministry and mission. For the local church, your “basecamp” includes your facilities and resources that provide space and the budget for people to gather, hold classes and worship, and a platform for engaging the community.

Care for your “*basecamp*” includes making certain the facilities are safe, secure, and insured. Confirming that resources are well tended to, that there is enough for the present but also assets to maintain the mission and ministry in the future. In addition, there needs to be a plan for replenishing people and supplies.

In the next two sessions you will access your ability to provide a safe, well-maintained, attractive, conducive place from which to grow disciples. In working through this process, you will be asked to consider a number of key factors including the current state of the church facilities and all that is needed to maintain and support them, present-day and future fiscal resources that can be used to provide for capital repairs and utilities.

Assess to understand.

Based on your Pathways Assessment Sustainability Asset Score from your Assessment workbook, consider what are the necessary first areas needed to be addressed for your congregation to increase in sustainability. (Property, Spending, Income, Debt, People)

What areas did you have the highest numbers?

1. Property issues may be affecting risk indicators 3, 4, 5, 6, 7, 9, and 10.
2. Spending generally shows up in all 10 risk indicators.
3. Income issues generally show up in all 10 risk indicators.
4. Debt generally shows up in risk indicators 3, 4, 5, and 7.
5. Not enough people generally show up in all 10 risk indicators.

While every congregation is to continually address areas of risk that weaken sustainability. Congregations with 4 and 5 sustainability may take appropriate risks to strengthen and further engage in ministry and mission. This may include things like hiring an additional staff person to grow a particular ministry or adding to or improving the building for mission and ministry. However, if there is an area that needs attention work, property issues, spending, income concerns, debt, or not enough people take time to concentrate on these sessions first.

Churches with 2 and 3 sustainability should review areas of deficiency and develop a plan to address them. While they may be addressed over 1-3 years, there must be a sense of urgency. You will either become more sustainable or lose capacity to sustain mission and ministry.

Churches with an indicator of 1 sustainability, unless they take immediate steps to address issues so that the risk factors are eliminated not just alleviated, will need to have a conversation about what it means to be a legacy church. A legacy church is one whose best years are behind them and that they will close soon.

Homework:

Do Properties, Income, Spending, Debt, Not Enough People Inventory (Appendix B)

■ *Session 3*

Comprehending to Understand

EXERCISE: Make a 12' timeline with a roll of paper with three rows on it, or the digital equivalent. Ask each person to take a few moments and jot down key moments in their life, the life of the congregation, and the world in the last 20 years.

Invite each person to write these on the timeline, a row for “personal moments, congregational moments, and world events that were key (celebrations, challenges, seasons...)”

Divide up into 2 or 3 groups and study the timeline.

- What did you notice? Are there trends or connections?
- Does this have any impact on the congregation's next 5 years as you project out?
 - o What do we now know that informs what we will now do?
 - o What are we already doing well that we will build on?
 - o What do we need to do differently based on what we have learned?
 - o What aren't we doing that we need to do in the future?

Cultural Heritage

Our church buildings are to be a place where all people are welcomed to worship God. Each congregation has a unique heritage, likely based on the cultural context at the time it was formed. This is evidenced in the church's location in the community, its architecture, art including stained glass windows, memorials, and other objects displayed in the church and its holdings such as cemeteries.

It is essential that members of the church take a prayerful and outward look at their properties and holdings and practices to assess how they might be an obstacle to others to see the fullness of God's love while visiting your church.

We are imperfect and broken beings who inhabit an imperfect and broken world. The genius of the human heart lies in its capacity to use these tensions to generate insight, energy, and new life.

Parker Palmer

Over the time that you are working through this sustainability module, you will be considering how the past and present are intersecting and what you need to adapt for a fruitful future. Part of this work will be to consider how your history might be affecting your vision for today. This will include many different aspects including looking at how different practices or objects in your setting may impact your vision and mission. You will consider how your practices and use of your property might be creating generational, relational, and cultural obstacles.

In this time of introspection, it is also important to celebrate the efforts of the faithful that came before you and lift up their sacrificial giving as an inspiration for the current church membership. As well as giving thanks for your community and all the ways that they offer insight and new life to your vision and mission.

The above timeline captures each of your firsthand experiences in this church. Create a team from the congregation and maybe the community to work on cultural relevance. Have them create a timeline for the church. Include information to answer the following questions: What are the milestones? What were the challenges? What might you call into question in your current vantage point?

Next, have this team create a pictorial journal of your property and holdings. Have the team consider these questions: Are there objects or spaces that might cause harm to others? Create a disconnect with those outside your community? In Session 5 receive their findings

Review Properties, Income, Spending, Debt, Not Enough People Inventory

- What new did you learn
- What needs to be adjusted immediately, within 2 years, within 5 years.
- If you were developing facilities for your present size and community needs, what would they look like?
- What are the opportunities and challenges

Based on the data and risk assessment on sustainability, discuss as a team what is the potential and probability of your congregation remaining sustainable in the near future, 1 to 3 years, and then for the next 5 to 10 years.

As you have finished assessing your present ministry, what are the key risk factors or challenges for your congregation moving forward?

- Prioritize and use a scale of 1-10 on the importance of addressing each of these risk factors.
- Then rank the possibilities on a scale of 1-10 for being able to find a way to address or resolve issues around that risk factor.

Finally, have the team take a moment to breathe in and ask for Spirit guidance.

Then, honestly with each other: On a scale of 1-10, with 10 being highly likely and 1 being most improbable “not happening”, what is the probability of the issue being resolved or addressed?

At this point with the help of your coach you will take the next best step for your congregation. If the team feels like it is probable for you to overcome your challenges, then you should move on to Session 4. If you are concerned about the realistic ability to resolve these issues and risk factors this might be the time to connect with your District Superintendent on the next steps.

■ **Session 4**

Vision and Mission

Many of us lack clarity, struggle to get folks on board, struggle to get them to stay on board, and lack direction because we lack true mission and vision. Many do not know the difference and if we do, it is not evident in our current missions and visions that we do.

Vision is our future. Mission is today.
Vision pulls. Mission pushes.

Mission

Go to the people of all nations and make them my disciples. Baptize them in the name of the Father, the Son, and the Holy Spirit, and teach them to do everything I have told you. I will be with you always, even until the end of the world. Mat 28:19-20

Mission tells us why we exist now. Mission is our call to be now. Mission is our marching orders. Mission pushes us forward to where vision is pulling us. Our mission as United Methodists is to make disciples of Jesus Christ for the transformation of the world. For each local church we carry out the same mission.

Mission does not often change. It is our DNA. It describes to us the fruit of our collective gifts. Mission develops but is consistent. Mission is who we are. It is why we exist. Mission says to people, you have a purpose and set up the purpose for being a part of the church.

Here are some steps to affirm the mission.

- Pray.
 - Pray with everybody starting with leadership. Include the congregation.
- Assess.
 - What has the mission been? Does it fit? How does it connect to the mission of making disciples?
 - Warning: you may find that the focus of the church is off and needs to be shifted. Welcome this discussion. Approach it with care and grace, but do not avoid it.
- Focus.
 - The mission is a clear and direct statement of why we are here.
- Explain.
 - This is where you share the details of why we are here and how we intend to be in relationship with the world around us accordingly.
- Communicate.
 - Make sure everyone knows and understands the mission. Do it often.

Vision

Vision is a destination. It is a desired point to achieve; it is a DREAM. Vision is a place we aspire to be. A place where God is calling us to be, but we have not reached yet. Vision is crucial to have because it gives us a place to go. It gives us a collective goal to reach. It says to us and those who are seeking a place to belong, that we are not complacent where we are. Vision reminds us that we are on a journey and cannot stay here. Vision says to us there is hope. Vision awakens the gifts in us. Vision says to us to we have what it takes to become and do something greater, but it will take all of us to get there. This is where the tough part of vision comes in. Vision both repels and attracts. Not everyone will agree with it. Not everyone will want to go. But most will want to grow, and at a minimum, survive. Vision gives them a plan.

Vision emerges from dreaming. It comes after prayer. Vision begins to form when we get out of the pews and go up onto the balcony; or when we leave our buildings and go to the highest point in our towns and look out at all of the potential. Vision not only celebrates the gifts and treasures we have but sees who and what is missing. Vision comes from listening and dreaming together. From connecting with folks outside the church. From taking time to see what the community needs. Vision will never be something we can just check off tomorrow; but rather something greater and bigger than us that will take God and a faith community to reach.

Vision changes. It should change if we are reaching goals. It should as the church grows. It should as the church listens more and more to God. It should not just change with every new pastor. That could be a symptom that the vision was never bigger than the leader and the rest of the church was never invested.

For those that need steps.

- Dream.
 - Dream with others. Dream with the church. Dream with community leaders. This is important, because sometimes we as leaders dream, and then we coerce and persuade until everyone's dream looks like ours. Let the dream develop organically with more than just you involved.
- Pray.
 - Pray for God's guidance and direction for the vision.
- Focus.
 - Narrow the dream down to one or two short sentences.
- Checkpoints.
 - Begin to spell out what the checkpoints of success along the way look like.
- Finish line.
 - Make it clear what reaching the goal looks like.
- Communicate.
 - Make sure everyone knows this is the plan. The leaders. The church. The town.

Homework: What is needed to support the vision?

- Finance reports for Spending and Debt
- YTD Budget
- Membership Report/Church Directory
- Last year's Treasurer's report
- Fund Balance Report

■ **Session 5**

SMART Goals

"Then the Lord told me: "I will give you my message in the form of a vision.

Write it clearly enough to be read at a glance." Hab. 2:2 CEV

Once we have a mission and vision. It is important that we do some goal setting. You will be naming three measurable goals that will help us reduce the risk factors and improve our basecamp.

However, too often goals are vague, lofty, or distant. Because of this they are never adequately reached. SMART Goals is an acronym that has been used for around three decades now that helps us set the right, reachable, excitable goals.

Specific. **Measurable**. Attainable. Relevant. Timely.

When setting goals for the work of the church and ministry (saying it this way because it is pertinent that not only the church has goals, but the ministries of the church have goals) that align with the mission and vision of the church, it is important that they are **specific**.

- Goals cannot be so vague that we cannot pinpoint what they actually are. This makes it look like we are dodging really accomplishing anything.
- Narrow them down to the necessary specifics of what they are and be precise

Goals must be **measurable**. A race is never won if there is no finish line. Neither is a goal met if there is no marker for success and recognizable checkpoints along the way.

Goals must be **attainable**. Setting a goal reaching 5000 people in the church is exciting, but if the town only has 3000, it is not attainable. Be realistic but do not set the standards so low there is nothing to challenge us or get excited about.

Goals should be **relevant**. Goals should not be the same as they were one generation ago. Some things grow stale. Some things we have lost passion about. Some things we hold on to, but the community does not care about anymore. Be relevant.

Goals should be **timely**. When should we reach this goal? When should we be hitting checkpoints? And most importantly, when and how often should we be checking in to make sure progress is happening? And what do we intend to do if there is no progress?

Writing Goals

A measurable goal includes the following. Some churches may have less than 3 goals in this area and other churches may have more than three goals depending on how many goals the congregation may be developing in other areas or the available people to work on the goals.

- Specific – it is clear, everyone can understand what you want to do.
- Measurable – It has something you will accomplish and often has a number associated with it.
- Achievable – it is a stretch, but you can achieve it in a certain period of time.
- Relevant – it is core to your ministry and something people will connect with.
- Time – it has a date by which time it will be accomplished.

Each will include 3 action steps. An action step is an activity or piece of work that will be done to accomplish the goal. Name a timeline for each of the action steps you have identified, for each action identify a date it will be completed. Name a person, not a committee who will be the champion for the goal. A champion is someone who gathers a team together to accomplish each goal.

Action steps will create transformation, not maintenance. However, work with Trustees to develop a minimally needed list for Basecamp repairs and upgrades immediately.

There are five areas that contribute to sustainability risk. Properties, Income, Spending, Debt, Not Enough People. Pick the area(s) critical for you to work on first. Consider what is the most crucial for the next year or two. After you identify the area you will focus, write three SMART goals and Actions Steps to guide your work.

Property/Facility issues:

Property – deferred maintenance, building size, and efficiency all contribute to sustainability.

- a. Deferred maintenance leads to more expensive repairs when issues are not timely addressed. For example, a leaky roof leads to ceiling and wall damage and mold problems when the leak is not addressed immediately.
- b. Oversized buildings for the number of worshippers means fewer people are paying to maintain the building which means less money for ministry and mission which attracts new people. Maintaining an appropriately sized building is important for the ministry and mission of a congregation. Many churches with under 100 in worship have buildings that were built for 300 or more. This can be a significant challenge to a healthy mission and ministry because 100 or fewer people are bearing the costs for what 300 or more people should be sharing the costs.

The following are things you can do to address property issues that are putting your church at risk.

- Assess all deferred maintenance, develop a project list, budget and timeline and begin to address deferred maintenance. This list should be updated yearly.
- Repurpose part of your building for other use so that you no longer incur expenses for that part of the building and possibly derive income from the repurposed use.

- Rent a portion of your building.
- Sell and move out of your current building and negotiate worshipping in another church or building or purchase a smaller building.

Right Sizing Facilities Exercise:

Take time as a team to list, on newsprint/ or digital whiteboard and also someone capturing the list in document form, all that is presently going on in and through your facilities.

Note the number of people presently involved in each event, ministry, or where an outside group uses your facilities.

SELF SAFETY CHECK - Are you using Safe Sanctuary with an up-to-date policy? Are all those using your facilities using Safe Sanctuary procedures? Do you have up-to-date facilities use policy and a copy of their insurance policies?

With the list in front of you, now consider if you did not have your present facilities:

- What facilities would you need to build or rent? Size/capacity?
- What would you want in the facilities you build or rent?
- Now consider your present facilities. Note the different spaces/rooms. i.e., Sanctuary with seating capacity of 300. Present worship size 45/average attendance. Envision 100 as we grow. (Want to be able to hold 25% more than your target number.)
- Create a list of the facilities space you need now and to enable the ministry you envision and can attain with high probability in the next 5 years.

Creative Use of Facilities:

If you have high-risk factors for sustainability the congregation may have decreased in size, had to make difficult decisions regarding finances and deferred maintenance, and be challenged with an aging facility designed for ministry in another era.

What ministry is God calling you to?

Where and what might a more efficient “Basecamp” be like for the present and the future?

If you are setting up a basecamp and there is drought or flood---common sense would suggest you move the basecamp. If you have a “basecamp” set up with stables for horses and now there are cars and trucks, then a sensible review and reallocation of space would mean converting some of the stables to parking.

How might you, if you discern that an option for the next 3-5 years is to “keep your present basecamp” and reallocate space? Could your fellowship hall be redesigned for more contemporary worship? Could several classrooms and bathrooms be lightly updated and renovated then rented out to a community partner?

- What are doable-high probability things you could do to update and begin to move toward a right-sized facility?
- What are the options to consider and explore---
 - o How much is your property worth?
 - o What if you sold it and rented or renovated a smaller facility closer to your target community?
 - o Is there another United Methodist congregation in the area? Are you cooperating or sharing in connectional ministry to bless the wider community? Are there any options?

- o What do we now know that informs what we will do?
 - What are the facilities like? Are there needed repairs that are being delayed due to a lack of funds? What are they? Approximate cost to repair?
 - Are there rooms that have not been updated in more than 25 years?
 - If you could make one change to your facility to modify it so that it became a better “basecamp” for ministry-what one change would you make?

Below, list your goal(s) for growing property sustainability, including the actions you will take to accomplish each goal and who will be the champion for the goal (a champion is someone who gathers a team together to work and accomplish a goal).

GOAL 1:

CHAMPION: Name: _____ Email: _____ Phone: _____
 Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
 ACTION: _____ Due: _____
 ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 2:

CHAMPION: Name: _____ Email: _____ Phone: _____
 Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
 ACTION: _____ Due: _____
 ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 3:

CHAMPION: Name: _____ Email: _____ Phone: _____
 Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
 ACTION: _____ Due: _____
 ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

Finance-Revenue, Income Issues:

Your income is not sufficient to meet the current budget and required expenditures. Income can be the most challenging areas when a congregation is addressing sustainability because there are limited ways of increasing income, and it usually takes three or more years to move to increase income to levels needed to sustain a vital mission.

The following are things you can do to increase income risk factors.

- Hold a yearly commitment Sunday where all members are asked to make a financial commitment to next year's mission and ministry. GNJ has resources to assist you in leading a commitment Sunday.
- Encourage members to list the church in their will, even if it is as small as 10%, a tithe.
- Each Sunday before the offering is received tell a story about how the offering touches or changes someone's life or how it impacted the ministry.
- Communicate regularly through newsletters, web page, and other communication resources how the congregation is making progress and changing lives.
- Ask! Share with people that you need a one-time gift for an important project.
- Rent part of your building.

Below, list your goal(s) for growing your income, including the actions you will take to accomplish each goal and who will be the champion for the goal (a champion is someone who gathers a team together to work and accomplish a goal).

GOAL 1:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 2:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 3:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____

ACTION: _____ Due: _____

ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

Spending Issues:

The congregation is spending more than it is receiving.

The following are things you can do to address spending risk factors.

- Evaluate your budget and reduce discretionary spending.
- Request the superintendent reduce the pastoral appointment by $\frac{1}{4}$ or more time.

Budget Review Exercise:

Congregations with smaller attendance in larger facilities or those whose membership has aged over the years without many new members often experience deferred maintenance on facilities and work to “cut” the budget and limit spending.

Initially, this might be viewed as a good decision, but deferred maintenance can accumulate, and property matters not addressed might compound in size and cost. Cutting the budget, year after year, means you get to a point where there is little more to cut, and the fixed costs make up a high percentage of the budget. It also means some items like “marketing and outreach”, ministry programming or staff have been reduced significantly.

Expense or Investment

There is an important difference between expense and investment as you look at your congregation’s budget. Regular budgeted line items or fixed costs where there is no expectation of a “return on investment” (ROI) is an expense; an example of this might be your utilities and property insurance.

While maintenance and cleaning are expenses for ongoing operations, capital improvement or dollars spent to upgrade and add to the life of a roof or enhance a property is an investment. Paying attention to furnace maintenance may save dollars on heating bills and keep it running longer and is a good maintenance practice. Care for the roof and major facilities areas, like replacing the furnace, are important capital investments. Note that the Annual Conference differentiates between expenses and investment in regard to dollars spent on facilities.

The Trustees should develop and regularly update an annual maintenance schedule, with information on the various vendors/service providers, for items such HVAC system maintenance, sprinkler system, landscaping/mowing, etc. In many congregations, there are one or two people who take major responsibility for facilities’ maintenance and know the churches’ various facilities or property systems. A number of local churches have faced a challenge when one person is taken ill, moves or dies and no one else knows about what is needed, when, and who services various parts of the physical plant.

The Trustees should also develop and annually review and update a Capital Improvement schedule for ALL properties, including the parsonage(s). In this schedule or report, it should be noted when a roof was put on, the contractor, life expectancy of materials, etc. If it is an appliance, when was it purchased, and what is the anticipated life expectancy? Having such a schedule allows the Trustees to work with Finance and Church Council to develop a replacement schedule.

Some dollars in the budget may be for investment where there is a “return on investment”. For instance, adding a part-time technology person will help with the goal of growing online worship attendance and giving. The SPRC may develop a new staff position (full-time or part-time) to help grow worship attendance, connections with youth etc. There is an expectation that this position will produce a positive outcome or return on investment. The Staff Parish Relations Committee should be clear with the staff person around expectations and goals-such as growing the youth group by 10% a year or to a certain size by a set time.

Dollars spent on advertising are also an investment where there is an expectation that doing strategic marketing, with a plan, over time will produce a positive outcome in more visitors. With items considered investments, there should be SMART goals established and tracked. If there are challenges in meeting the goals, then this provides a learning opportunity-what are the challenges or barriers to reaching the goal? What adjustments might be made and then in consultation what adjustments will be made?

EXERCISE:

Review the budget for the last one or two years. Identify spent for these categories?

- What is essential?
 - Is there any possibility of lowering the cost without negatively impacting ministry?
- What are non-essentials?
 - What value do these return to your ministry?
- What are your maintenance expenditures?
- What are your capital expenditures?
- What is a return on investment for which your congregation might develop clear goals?
- Are there creative ways to save (One church went to the non-profit version of QuickBooks from the business version and saved a lot)?

Below, list your goal(s) for reducing your spending, including the actions you will take to accomplish each goal and who will be the champion for the goal (a champion is someone who gathers a team together to work and accomplish a goal).

GOAL 1:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 2:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 3:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

Debt – debt requires payments that can take away from mission and ministry that grows enthusiasm and commitment to the congregation and its ministry. Some debt is appropriate for a building project, for example because it increases enthusiasm for the mission and ministry.

The following are things you can do to address debt risk factors.

- Hold a stewardship campaign and ask for pledges to reduce the debt.
- Sell things that are no longer essential for a vital mission and ministry.
- Renegotiate loan payments to a lower rate.

Below, list your goal(s) for reducing your debt, including the actions you will take to accomplish each goal and who will be the champion for the goal (a champion is someone who gathers a team together to work and accomplish a goal).

GOAL 1:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 2:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 3:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

Faithful People – ultimately, people are key to vital and sustainable mission and ministry. Without people to carry out and financially support the ministry, you will always be at risk of not sustaining mission and ministry.

The following are things you can do to address not enough people risk factors. It will take 2 years or more to see results. For a comprehensive guide to growing in this area consider the Pathways Congregational Health and Fruitfulness Module.

- Teach the congregation how to invite new people.
- Utilize an asset-based evangelism plan where the laity can share their faith within their circles and the community.
- Add an additional worship service.
- Change worship style to better connect with the people in the community.
- Improve preaching, music, and overall worship experience.
- Offer more small groups and invite friends, neighbors, family members and co-workers.
- Improve the grounds around the church, make entrance ways more inviting, declutter the church and overall make inside the church more inviting, welcoming, and appealing.
- Include worship leadership that is representative of different ages, genders ethnicities and races.

Below, list your goal(s) for growing, including the actions you will take to accomplish each goal and who will be the champion for the goal (a champion is someone who gathers a team together to work and accomplish a goal).

GOAL 1:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 2:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

GOAL 3:

CHAMPION: Name: _____ Email: _____ Phone: _____
Start Date: _____ Due Date: _____

List the actions your congregation will take to fulfill this goal:

ACTION: _____ Due: _____
ACTION: _____ Due: _____
ACTION: _____ Due: _____

What will be different if our congregation accomplishes these goals?

■ Session 6
Budget

Creating a budget

Developing a budget is a collaborative effort of the church leadership. Your church budget should reflect your vision and priorities. It will help your congregation set goals as well as limits. Keep the budget simple and be careful to set realistic income and spending goals. Make sure part of the budget goes towards saving for capital expenses and emergencies.

Start with your income, look at the past couple of years and determine if it is going up or declining. Consider where your money is coming from.

“Many denominational organizations are facing a long-term trend that is radically changing the way they finance their work. Some denominational organizations recognize this trend and are responding to it by multiplying their denominational funding streams. Other denominational organizations are in denial about the funding transformation that is occurring and are failing to multiply their funding streams.” George Bullard

The key to future funding is to not rely on one stream or even one source such as only church members. Churches must explore how to get non-members and non-attenders to give to the church's causes and support it in ways that will augment what the church seeks to do.

1. Tithes and Offerings

This is the basic funding stream in most congregations. This is increasingly not the way most new persons, and the younger generations give. Many view the offering envelope as a relic of a bygone age. It is expected that within a decade church's receipts from undesignated gifts will be half of what it has been.

- Offering envelopes are a classic example of tithes
- Loose plate collections are another example of undesignated gifts
- Online giving invites more people to give to the church and mission

2. Special offerings

Most special offerings are collections for missionary work or specific needs. All this money is forwarded to another agency and the church doesn't keep any of it, not even a “handling fee.”

- The Special Sundays of The United Methodist Church, celebrated annually, illustrate the nature and calling of the Church, including Native American Ministries Sunday and Peace with Justice Sunday
- Annual Conference special giving opportunities such as Miracles Everywhere campaign

3. Designated gifts

Younger givers prefer to see their gifts going for a specific cause that tugs at their heart or just fancies their interest at that moment. Younger generations feel they can change the world – because their parents told them they could. And now, they're doing just that, one cause at a time with more and more money each year.

- Imagine No Malaria to stop malaria
- Special missions such as for digging wells or opening schools
- Advance Specials are the designated mission giving channel of The United Methodist Church. Gifts for people after a natural disaster are common

4. Fee for Services

People have certain needs and if a church can meet those needs, people will pay for the services provided. These services don't have to be religious but sometimes they are.

- Childcare centers or pre-school programs
- Professional counseling services

5. Capital Campaigns

Every few years, growing churches need to raise serious money for a project on their campus. Usually, these campaigns happen no more than every three to five years.

- Building a new building
- Pay off debt
- Spruce up existing buildings

6. Foundations of the Organization

People who love their church want their church and even specific programs to continue well after their death.

- Endowments for church maintenance, communion flowers, and lawn care
- Benevolence needs and missions causes
- Scholarships for children to attend camp and go on mission trips

7. In-kind resources and services from individuals and businesses

Many members and even people from the community want to give back to their churches with their experience and expertise.

- Tradespeople: electricians, plumbers, carpenters, painters, etc. are used for needs within the church and on mission trips
- Accountants to do their internal audits
- Volunteers to meet needs that would otherwise require paid staff, such as receptionists, musicians, and other personnel

8. Sale of Products

Churches are seeking to be the “third place” where people spend time. Home is first, work is second, and many people spend the next highest amount of time in a gym, bookstore, coffee shop, or another place that has some attraction to them. Churches are realizing they can offer a place where people can gather

- Coffee shops and bookstores in church buildings
- Columbarium (a place to deposit cremated remains of people) which in time will become revenue sources and whose invested assets can provide funds for the facilities and grounds
- Gyms and recreation centers which are free to members and reduced in price to non-church members
- Galleries or flexible working environments

9. Foundation grants

Every year great wealth is distributed by foundations to help meet social needs. Churches need to work with grant writers to find out how to draw on these revenue sources which can exponentially help what a church is already doing but use an outside source of funds.

- The Lilly Endowment and Duke Foundation are major donors to Christian causes
- Community Foundations in major cities will help social needs which are supported by churches and other social organizations

10. Investment Income

Collectively churches have billions of dollars in checking, investments, and other financial assets. These can generate a stream of revenue (interest, capital gains, realized and unrealized gains, etc.) which can help the church meet its financial needs.

- Stewardship Foundation
- Money market accounts

11. Rental Income

Most church facilities sit empty during the week.

- Local businesses sometimes use church space as meeting rooms or for conferences
- Musicians sometimes rent sanctuaries for performances
- Other churches or non-profits

12. Event Registration

There are many events in every church and churches should be willing to look at how those events can be paid for by the participants. Some people feel the church should pick up the entire tab, but this is not possible for everything. Churches can let people know that the church is subsidizing part of the cost of the event but that it expects attendees to pay for another part of the cost.

- VBS fee for each child who registers, and the fee is used to offset the cost of materials and crafts
- Simulcast conferences

13. Cost Recovery

Church budgets have a variety of costs that, if given the opportunity, members would love to sponsor. One of the most common is the communion table flowers each Sunday which are often given in memory or in honor of a person, and the family reimburses the church for that expense.

- Sunday school or small group books or study materials
- Church flowers
- Paying for coffee purchased for the Sunday fellowship

14. Business Partnerships

Almost every business wants to support their community, but many don't know how except to give to major causes like cancer or heart research. Creative churches can partner with businesses to support the local community.

- Literacy campaign
- School support such as backpack supplies
- Clean up campaigns

15. Offerings After Special Events

Host events that the local community is invited to attend. These are opportunities to thank people for coming and to give them a chance to give back to the church that put on the event.

- Concerts
- Spring and fall festivals

16. Sponsorships and Scholarships

Adults want kids to experience things outside the norm such as going to summer camp or going on a mission trip.

- Contact people who solely or with a few others can provide the funds
- Ask classes or small groups to collect funds to take care of a need

17. Ownership of Facilities

Encourage members and groups to “adopt” various rooms in the church with the expectation that they will repair and maintain them.

- Classes and small groups can buy and install new whiteboards, chairs, wall hangings, and other items
- Groups could paint their rooms and even buy an area rug or help with the cost of a carpet

18. Memorials and Memorial Funds

When people die, family and friends give money to the deceased person's church. The church leadership should have a plan as to what those memorial funds. (Remember the trustees are required to receive all endowments)

19. Capital Investment Lists

Churches have capital needs, items that require a substantial investment by the church. Churches should create capital needs lists that itemizes, analyzes, prioritizes, monetizes, and is publicized to the congregation.

20. High-Capacity Donors

Your church likely has at least one high-net-worth individual or family. Making them aware of your needs and your vision is essential.

- Choose two to three dates at the end of the year to pitch the vision for the upcoming year to your high-capacity donors and leaders
- People are more concerned about human needs than facilities, a strong connection between meeting a personal need will kindle a fire of generosity

21. Gratitude Gifts

People can be invited to celebrate milestones such as weddings, birthdays, graduation, and retirements with a contribution of some sort to the institution that meets a tangible, permanent need.

- A group of graduates could pool together to buy for the younger students
- People ask for donations to the church rather than a gift on a special occasion ¹

22. Alumni Gifts

Bring together former members come to celebrate the heritage that formed them as children, teens, and/or young adults.

- Invite returning guests to make a special gift to the church that formed them so that the church can invest itself in the next generation and the generation.

“Give away your life; you’ll find life given back, but not merely given back—given back with bonus and blessing. Giving, not getting, is the way. Generosity begets generosity” Luke 6:39 MSG

Set Your Budget’s Expenses

Now that you have your projected income, it’s time to plan for expenditures.

Look at last year’s expenses and plug in the various categories.

- **Facilities and Maintenance:** All items that have to do with church properties, utilities, repairs, upkeep, contracts such as exterminators
- **Staffing:** All items that have to do with both pastoral and lay staff.
- **Administration:** All supplies to run the church such as equipment needs, office supplies, phones, software, postage, etc.
- **Ministry:** All ministry expenses
- **Leadership Development:** Materials and workshops for non-staff learning.
- **Marketing:** Websites, banners, postcards, and other ways you market the church
- **Hospitality:** Expenses related to events and social gatherings
- **Capital Expenses:** Major repairs and renovations
- **Other Operating Costs**

Church Budget Worksheet

Income

Pledges/Envelopes _____

Plate _____

Building Use _____

Fundraisers _____

Other _____

TOTAL INCOME

Expenses

Facilities and Maintenance

Church Property:

Utilities _____

Insurance _____

Maintenance _____

Supplies _____

Capital expenses _____

Other _____

¹ Developing Revenue Streams: Adapted from material by George Bullard and Steve Law

Parsonage:

Utilities _____
Insurance _____
Maintenance _____
Capital expenses _____
Other _____

Staffing

Pastor's Salary _____
Pension _____
Healthcare _____
Accountable Reimbursement _____
Other _____
Staff Salaries _____
Payroll expenses _____
Other _____

Administration

Supplies _____
Machines _____
Postage _____
Other _____

Ministry

Worship _____
Christian Education _____
Evangelism _____
Missions/Outreach _____
Youth _____

Leadership Development

Workshops _____
Other _____

Marketing

Supplies _____
Other _____

Hospitality

Events _____
Other _____

TOTAL EXPENSES

Income/Expenses Difference _____

■ **Session 7**

Transformation

And whatever you do, in word or deed, do everything in the name of the Lord Jesus, giving thanks to God the Father through him. Col 3:17

As you set forth on your strategic plan consider how you, your congregation, and community will be changed by these actions.

Transformation is moving from despair to hope

- a. What will be different if you accomplish each of the goals?
- b. What will your congregation be and do differently?
- c. What will you be doing in the community to connect your goal activities with the people in the community?

Now go forth to take action to transform the world. Take initial steps toward prioritized work.

Evaluation

These are some of the primary drivers behind executing your plan:

- Clarity – do people know the goals or priorities of the church?
Commitment – are the church's goals the people's goals?
- Translation – do people know what they need to do to help achieve their goals?
Enabling – are the structures, systems, and cultures set up for people to do their best.
- Synergy – people work well together.
Accountability – there is a system of accountability.

Here are 4 practices to keep the congregation on focus to execute their goals.

- Keep focused on the most important goals, give yourself the time and the energy to focus on your strategic plan, and do not have the goals you set compete against other work. This may mean setting aside some things to do this well.
- Focus on the lead measure and not the lag measure. Lead measures track the critical activities that drive or lead to the lag measure. A lead measure must be something that the participants can influence.
- Define the means to measure your progress. Without clear measures of success, people are never sure of the goal – and how close they might be to victory – or defeat.
- Create a regular way and means to be accountable to your progress. This should be often, short and very concise. See Appendix D for an example.

Communication:

Regularly engaging the congregation in the progress on your goals is essential. How you communicate your plan to the congregation depends on your congregation's culture:

- Gatherings for the whole congregation
- Town hall meetings (where people come to receive information and ask questions), newsletter, stewardship letters
- January state of the church
- May a mid-year check-in
- September stewardship drive letters
- Informal conversations for the leaders
- Church council/leadership boards
- In-depth report from the leaders, especially finance and trustees
- The committee chairs or those who are managing the budget should offer a budget to actual report regularly at council meetings

The pastor has a key role in reviewing the progress towards the goals.

- Weekly communication with the team leaders about how the congregation is progressing towards the goals.
- Monday rhythm of review of attendance and giving, who was present or missing and how were this week's donations as well as "YTD" status.

Evaluation

- What is going well, in terms of your basecamp and sustainability, that we will build on?
- What do we need to do differently based on what we have learned?
- What aren't we doing that we need to do in the future?

One way to measure your plan's lag goals is through conference required paperwork:

- Jan (end of year statistics and financials)
- May (Fund Balance Report)
- September (Charge Conference prep)

■ **Session 8**

Keep Going

Now that you have begun your plan toward sustainability it is time to engage more fully in new ways to be engaged in your community.

- Conduct an asset mapping exercise to identify potential partners as you leverage your facilities and ministry, looking for cash flow streams and develop a sustainable ministry plan. See Appendix E.
- Identify who in your community might partner or need facilities like those of your congregation.
- Work through needed steps for approval and implementation per the Book of Discipline with Trustees, Finance, Church Council or Charge/Church Conference and as needed the District Committee on Building and Locations.
- One year after setting of your goals redo your sustainability review. Celebrate where you have seen improvement and continue to work on the areas where you are still struggling.

Appendix A – Prep for session 1

Do a prayer walk or drive through your "neighborhood"

A prayer walk is exactly what it sounds like: a walk filled with prayer. Prayer walking simply involves walking around your community, praying for the places and people you see around you.

You can work out the route in advance where you are going to walk (or drive), or go wherever God leads you, but to stay within the geographical area that your church serves. Ensure that those who have difficulty walking can still take part in the event, either by praying at home or by having a short route to walk, with plenty of stopping points.

Prepare some ideas of locations or things people can pray for while out walking. Some locations where you may want to prayer-walk (or stop for prayer) include:

1. Government buildings
2. Fire, Rescue Squad, Police
3. Schools
4. Hospitals
5. Local business areas
6. Open spaces, such as parks
7. Retirement homes
8. Social Agencies
9. Religious buildings

As you begin your walk simply pray this prayer:

“God show me what you want me to see in this neighborhood.” And start walking and watching.

If you are going in pairs, try not to talk to the other people with whom you are walking during your walk. This is a time to watch and listen. But if you meet people along the way definitely engage with them.

What does God show you about your neighborhood?

Appendix B - Homework Session 1:

Properties, Income, Spending, Debt, Not Enough People Inventory

Facilities/Property Inventory

- Does the congregation own property in addition to the church? If so, what?
- What is the age of those buildings?
 - Regarding property other than the church: Are all properties regularly occupied?
 - If yes, does the congregation have any formal lease occupants to any owned property? Specify (attach lease copies)
 - Any occupants without leases? (specify)
- Does your church own vacant land? If yes, was there ever a structure on it? Are you aware of any underground oil tanks or storage systems on the property or vacant land?
- Does your church own a cemetery? If so, please describe the condition of the cemetery? Address of cemetery? Open or closed How much do you have in the perpetual care fund? Is it in a separate bank account?
- Have you had any real estate appraisals performed on any properties within the last two years?

Facilities/Property Condition/Damage Assessments:

- What is the age of the church?
- What is the general condition of the church and properties?
- Are repairs performed promptly to prevent building deterioration?
- Is any church-owned property part of any historic commission or registry in your city?
- Is the property subject to repetitive risk exposure, such as flooding/leak/rising waters, windstorms, vandalism, etc.?
- Have you had any insurance claims for damage in the last three years?
- Have you had any property damage inspections by a contractor, inspector, or engineer in the past three years? Why? Did you receive a report?

Your annual parsonage inspections should detail the condition of the parsonage(s), use this checklist to consider other church owned properties:

- Are roofs inspected annually?
- Are windows and doors in good condition?
- What is the condition of the electrical system? Does it meet code and is it safe?
- Are walkways free from cracks, kept clear of loose gravel and other foreign materials?
- Are there any tripping hazards on the sidewalk, lawn, or parking lot?
- Are there potholes in the driveways or parking lot? Are there parking blocks in the parking lot?
- Are parking lot traffic signs in good condition and positioned for easy viewing?
- Is the parking lot adequately marked and lit?
- Is there a wheelchair-accessible ramp, and is it inspected frequently?
- Are steps free of cracks? Are handrails securely anchored?
- Are trees maintained?
- What is the condition of major finishes, such as carpeting, tile, and other flooring materials?
- Does the condition of your facilities make a poor impression on visitors?
- Is the building in good structural condition?

- Any owned property with existing damage? Describe?
- Any property with excessive damage that impacts safety or health?
- Any existing damage or condition that prevents occupation of all or part of any building(s)?
- Is any church-owned property part of any historic commission or registry in your city?
- Have you ever applied for, or received grants and/or loans from any agencies/organizations to repair any portion of owned property, interior or exterior?
 - Please explain. Did any of these loans or grants cause there to be a lien on your property?
- Is the property subject to repetitive risk exposure, such as flooding/leak/rising waters, windstorms, vandalism, etc.? Describe
- Have you had any insurance claims for damage in the last three years? Explain
- Have you had any property damage inspections by a contractor, inspector or engineer in the past three years? Why? Did you receive a report?
- Do you have a fire prevention plan?
- Do you have a plan for removing heavy snow or ice loads from roofs to prevent collapse?

Spending/Debt

- Do you have any loans or grants that cause there to be a lien on your property?
- Has your debt had a negative impact in any way on the church's ability to meet current operational needs?
- Does the church have 3-6 months of operating expenses and set it aside for emergencies?
- Does the church have a mortgage?
- Are there any other forms of unpaid debt such as credit cards or loans? Unpaid conference billings?
- Does your church pay current fair wages for all your staff including the pastor?
- How much does your church have set aside for capital repairs?

Faithful People

- How many active members does your church have? What percentage of your membership live within 3 miles of your church?
- What is the average worship attendance?
- Does your leadership use Mission In-site to inform mission or program planning in any way?
- How many active worshippers belong to the immediate, local neighborhood or area within 3 miles of the church building? How many local, neighborhood members are part of laity leadership?
- Describe the church's reputation and mission to the immediate, local community?
- Describe the relationship with local government?
- Is there a desire to expand or grow the missions and programs you offer the community?

Appendix C (for those considering property changes)

Buildings

Real estate is a church's largest asset, often comprising 90% or more of a church's total assets and 50% or more of its operating expenses. There are various options and some crucial factors that churches need to consider when evaluating their property for the possibility of making a change towards a more sustainable future.

Options:

1. Downsize
2. Merge/keep/and sell
3. Lease out
4. Develop: And keep church/and not keep church
5. Liquidate and sell: At market price/for community use

If you believe your congregation has outlived its need for its current properties, these are some considerations. None of these should be undertaken without a conversation with the DS and the District Board on Church Location and Building.

Factors towards a successful change:

- A. Property
 - a. Large or small?
 - b. Good or bad condition?
 - c. Clean title?
 - d. One or more lots?
 - e. Cemetery?

- B. Market
 - a. High- or low-demand?
 - b. Possible uses?

- C. Politics
 - a. Zoning?
 - b. Environmental regulations?
 - c. Pro- or anti-redevelopment neighbors?
 - d. Neighborhood association?
 - e. Administration?
 - f. Council?
 - g. Social and news media?

- D. Money
 - a. Appraisals?
 - b. Sources of project money—private/public?
 - c. Return apportionment?
 - d. Risk apportionment?
 - e. Spreadsheets?
 - f. Contingency?

- E. Congregation
 - a. Solvent or insolvent?
 - b. Young or old?
 - c. Clergy- or lay-led?
 - d. Decisive or indecisive?

- F. Denomination
 - a. Book of Discipline

- G. Partners
 - a. Possible developers, experienced or inexperienced?
Architects? Attorneys?
 - b. For-profit or not-for-profit developers?

Adapted from notes of Rick Reinhard, The Lakelands Institute and Niagara Consulting Group

Appendix D

Monthly Church Checklist

To continue growing and moving forward toward our goals, the pastor and a team need to check in monthly to ensure these tasks are complete.

| Task | Completion Date |
|---|-----------------|
| Share one story of transformation surrounding your plan. | |
| Team discussion: Review last month's statistics. What are we noticing and learning? | |
| Team discussion: What goal were we working on this month? How did it work? | |
| Team discussion: What are project/initiative updates? | |
| Next phone call or meeting with coach is scheduled | |

Share one story of life or community transformation.

Pastors and church leaders are called to share celebrations of what God is doing regularly so that the church and community know and get involved.

Team discussion: Review last month's statistics. What are we noticing and learning?

While it isn't enough to just report the numbers; monthly, set aside 5-10 minutes for a discussion of what you're seeing and learning from the reports.

Team discussion: What goal did we work towards this month? How did it work?

The only way for a church to grow to the next level is to try something new. Take a risk and try something new each month. Whether it works or not, ask how it worked and reflect on what you learned. Don't spin your wheels or get stuck here, a 5 or 10-minute conversation may be plenty.

Team discussion: What are project/initiative updates?

What are we looking forward to? It may be a new project or something you have been doing for a long time. It's important to have a calendar of upcoming events and ensure that your church and leadership team are doing what they can to maximize impact for guests, new disciples and the community. We recommend spending the most discussion time here and understand the limit these three discussions to 30 minutes.

Next phone call or meeting with DS is scheduled

As we move our planning into action, accountability and ongoing learning are key. Each month make sure your team or pastor connects with your coach, and get it on the calendar early!

Appendix E

Asset Mapping

What is Asset Mapping?

1. An inventory of the positive people and things in your community that contribute ideas, resources, and capacities.
2. An asset map provides information about strengths and resources of a community

Why is Asset Mapping Helpful?

1. Once community strengths and resources are inventoried and depicted on a map, you can more easily think about how to build on these assets to improve community needs.

What is a Community Asset?

1. Anything that improves or could improve the quality of community life.
 1. The capacities and abilities of community members.

2. A physical structure or place. For example, a school, hospital, or church. Maybe a library, recreation center, or social club.
3. A business that provides jobs and supports the local economy.
4. Associations of citizens. For example, a Neighborhood Watch or a Parent Teacher Association.
5. Local private, public, and nonprofit institutions or organizations.

Getting Started

1. Define community boundaries
2. Identify and involve partners
3. Determine what type of assets to include
4. List the assets of individuals
5. List the assets of groups /associations
6. List the assets of institutions/places
7. Organize assets visually

Asset Mapping

