



Strategic Planning • Annual Giving • Capital Campaigns

CREATING PLANS PEOPLE WILL SUPPORT!

How does an organization formulate a vision, a plan, or a set of goals? How does it formulate a plan that people will respond to? Today “To succeed, a church, school, or organization must plan to succeed!” Planning is more and more critical to success. These plans are based on a church’s mission (to be a family, share the Good News, worship, and serve the poor and needy). With today’s challenges, these plans need to be bigger, bolder, and more imaginative than ever. Bold visions stir the blood and gain people’s financial support!

Emergence of Vision (Plan) – A church can put together a plan based on NEEDS and OPPORTUNITIES. Some churches have talked about new buildings or programs for years; when the time is right, the plan emerges quickly. Other churches take a more methodical approach to look at their community, their program needs and opportunities, and their future facility needs. Ideally, VisionWorks recommends a more comprehensive planning process to develop short, medium, and long-range plans in all key areas of an organization.

10X Rule – The 10X rule states that an individual or organization should aim high and go big to do better than it otherwise could. What are some examples of big goals or plans? For example, a church may set a goal of growing 10% a year, or instead of having 1,000 people attend worship a weekend, aim for 2,000 per weekend (through being welcoming, excellent preaching, and outstanding music)! Instead of a high school enrolling 100 new students each year, they should aim for 250 or 500! Instead of providing shelter to 100 homeless people a day, aim for 250 or 500. As you can see, the 10X rule is not a literal 10X, though it can be. Rather, it says, “Aim many times higher so that you can do better or be more impactful.”

Take Some Prudential Risks – There are many great needs for churches, schools, and organizations to fulfill today. Life is changing quickly today, and your members have a sense of this. Members of an organization tend to appreciate a vision or dream or set of goals that take a little bit of risk to change the neighborhood, the city, and the world.

First Plan or Case Statement – Usually, through a formal or informal planning process, many needs and opportunities will be identified over the next five years. Many times the sum of these goals is more than can be addressed through a yearly budget. Then, a church or school must put together a case (a collection of projects) into a basket. In this basket should be items that are needed, urgent, and compelling. An organization should try to put several things into the basket that appeal to the main segments of your community. Include some items that are new, impactful, and exciting.

A Feasibility (Planning) Study – A church, school, or organization should always conduct a feasibility study to assess donor and member support. If there is strong donor support, especially from major donors, then a capital campaign has a greater chance of success. We were contacted by a church that wanted to do a \$5 million church and campus renovation. The church did not do a feasibility study. They hired a company, and the planned \$5 million campaign turned into an actual \$1.6 million result. Why? As church members visited key donors, they discovered that the proposed church renovation was too “modern” for their tastes. Had the church done a study, then they would have heard this and they could have adjusted their plans. The campaign turned into a failure. You only have once chance to get it right. Always consider a feasibility study.

Final Plan or Case Statement – After the study, an organization can then adjust the vision or plan, add some elements with excitement, take out some things that are controversial, and craft a more supported plan. This vision or plan becomes the basis of your capital campaign. This plan, which is the most supportable, will raise you the most money.

Capital Campaign – After the results of the study and the finalization of the plan, an organization can then make plans for the capital campaign. A capital campaign can take anywhere from six to 18 months, depending on the size of the organization. The main phases of a capital campaign are: Preparation -> Lead (Major) Gifts -> Information Sharing -> Reflection -> Pledging -> Pledge Fulfillment (3 to 5 years).

Contact VisionWorks and Mark Filips today – 402.999.2970 or markf@VisionWorksCo.com to begin putting our expertise to work for you!