

Strategic Plan

For:

Date:

DOCTOR Planning Process

The Following Strategic Plan guide is based on the book *Masterplanning* Bob Biehl. This is based on his DOCTOR planning process which is outlined below.

Direction

Why do we exist? What are our objectives? What do we do next?

Organization

Who is responsible for what? For whom? Do we have the right people in the right place?

Cash

What is our projected income, expense, net? Can we afford it? How?

Tracking

Are we on target? How do we improve? What do we cut and continue?

Overall Evaluation

Are we achieving the quality we expect and demand from ourselves?

Refinement

How can we be more effective and more efficient?

The **Direction** step is broken down into 11 elements to consider: (called planning *Arrow*).

1. Needs
2. Mission and Vision
3. Objectives
4. Milestones
5. Ideas
6. Roadblocks
7. Resources
8. Quarterly Goals
9. Short-Range Goals
10. Mid-Range Goals
11. Long-Range Goals

The Ministry Context

The Area of Ministry

Things to include in your list: social, spiritual, and educational characteristics of the people you are trying to reach. Significant groups of people with their nationality. Significant employers in the area. Places people naturally gather for events. And other characteristics you can think of.

Needs

DOCTOR
Arrow Step 1

What needs do we feel deeply burdened by and uniquely qualified to meet?

What makes us weep? What needs are aligned with our heart?

What am I uniquely gifted/qualified to do? What are our unique gifts?

Brainstorming: Focus on growth process

Purpose statement work/words: (e.g. Connect, grow, serve, go OR Evangelize, equip, export)

Potential Key Verses



Purpose

DOCTOR
Arrow Step 2

Why do we exist?



MISSION, VALUES, AND VISION

Mission Statement:

Key Areas Expanded in paragraph form:

Values/distinctives:

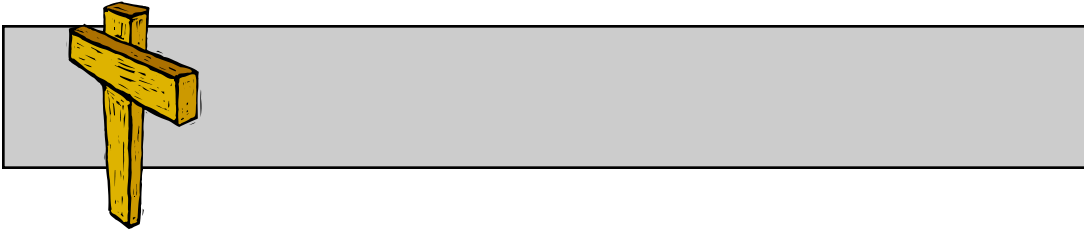
Vision Statements: (What do we want to see happen?)

Objectives

DOCTOR
Arrow Step 3

What areas should we impact?

What specific areas will we work on and set goals for?



Scriptural Basis:

Contexts: Where will this objective accomplished?

Topics: What topics will this objective need to address?

Tools: What tools will this objective utilize?

People in this Stage: At end of this growth stage, what will be the characteristics of the person?

Objectives

DOCTOR
Arrow Step 3



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Objectives

DOCTOR
Arrow Step 3



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Objectives

DOCTOR
Arrow Step 3



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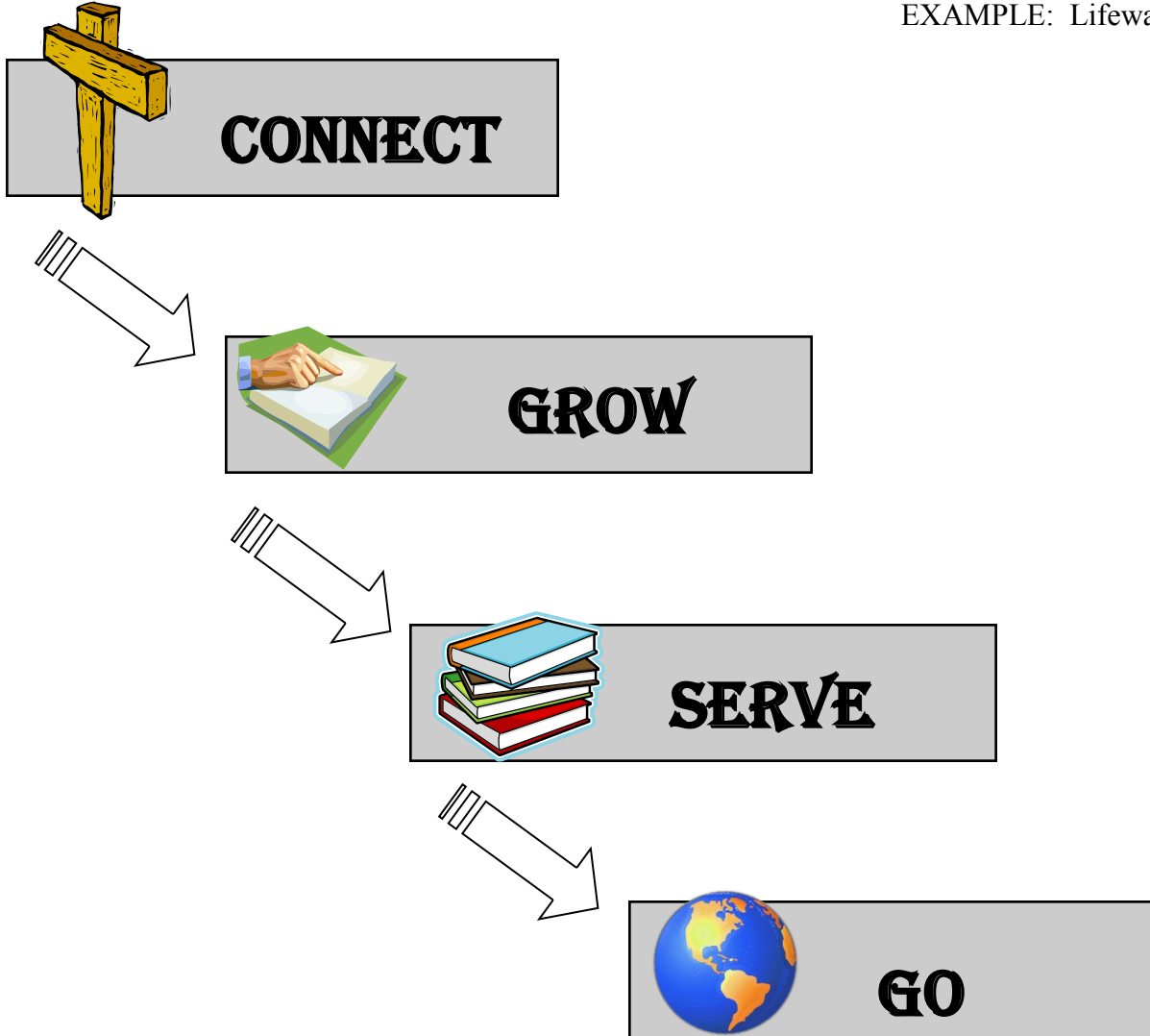
Tools: What tools will this objective utilize?

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Summary of Process

DOCTOR
Arrow Step 3

EXAMPLE: Lifeway





Milestones

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Arrow Step 4

How has God blessed us to bring us to this place? What have we already accomplished?

What has not worked? Why? How can we improve?



Ideas

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Arrow Step 5

What ideas do we have that we should consider turning into priorities?

Ideas:



Roadblocks

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Arrow Step 6

What roadblocks may keep us from reaching our full potential?



Resources

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Arrow Step 7

What are our greatest resources to help us? How can we utilize these?

Quarterly Goals

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Arrow Step 8

In the next 90 days, what are the three most important measurable, realistic targets of accomplishment for **each objective**? Include dates.

Short Range Goals

DOCTOR
Arrow Step 9

In the next zero to two years, what are our three most important, measurable, realistic targets of accomplishments for **each objective**? Include dates.

Mid Range Goals

DOCTOR
Arrow Step 9

In the next two to five years, what are our three most important, measurable, realistic targets of accomplishments for **each objective**? Include dates.

Long Range Goals

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Arrow Step 10

What three measurable, realistic priorities are we dreaming of accomplishing for **each objective** five to 20 years from now? DREAMS!

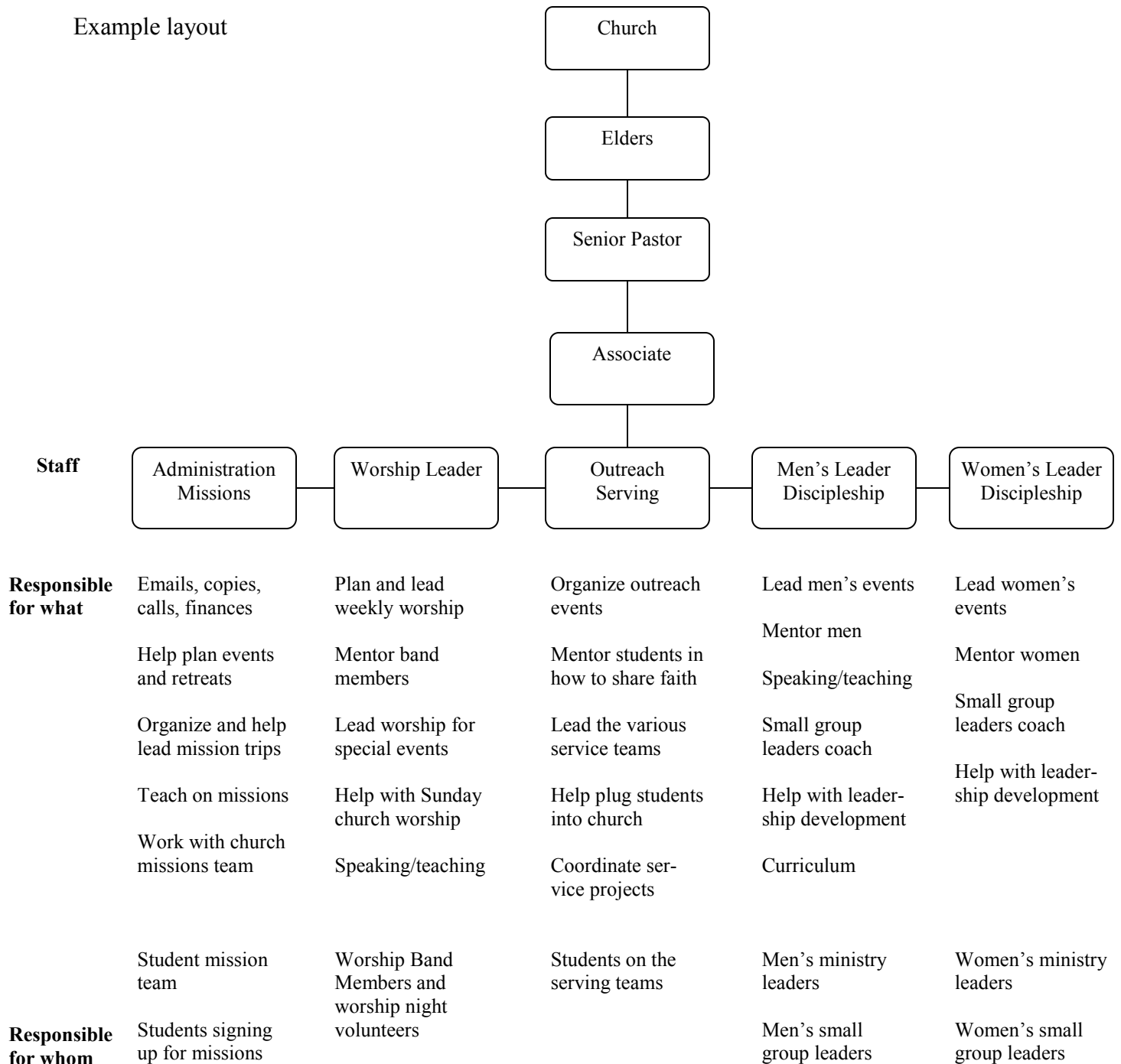


Organization

DOCTOR
Organization

Who is responsible for what? Who is responsible for whom? Right people in right places?

Example layout





Organization

DOCTOR
Organization

Who is responsible for what? Who is responsible for whom? Right people in right places?

Your Layout:

Supervisors

Staff

**Responsible
for what**

**Responsible
for whom**



DOCTOR
Cash

Cash Breakdown—Annual

Outflows

Item/category	Amount
Total	

Inputs

[illegible]

Tracking Worksheet

DOCTOR
Tracking

Are we on target? How will people report progress?

Name: _____

Date: _____

- A highlight is; A lowlight is:
- I have made progress in the following areas:
- I am planning to:
- I am having problems with the following in reaching my goals:
- Any other comments/suggestions/lessons learned:
- I would rate my personal happiness at: _____ (1-10) Why?
- You can pray for me in the following areas:

Hours this week _____

Signature of Supervisor: _____

Evaluation

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Overall Evaluation

Are we achieving the quality we expect and demand from ourselves?
How will we evaluate our staff, programs, and organization?

Evaluation Tools

- Mentoring Evaluation Sheet
—To be filled out before each mentoring session
- Staff Performance Evaluation
—To be filled out each year at annual review
- Event/Program Evaluation Sheet
—To be filled out after each program/event
- Small Group Evaluation Sheet
—To be filled in before and after each small group meeting
- Staff Position Description
—Blank worksheet to be filled in by staff person and supervisor
- Volunteer Position Description
—To be developed for a volunteer position with supervisor support

Others to develop:

Mentoring Evaluation

DOCTOR
Overall Evaluation

Person met with _____ Date _____

Brief summary of how the time was spent:

Personal information learned:

Prayer Requests:

Things to do before next meeting:

Any other ideas or needs discerned:

Staff Performance Evaluation

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Evaluation

Title/name of staff member to be evaluated _____

Name of person completing form _____ Date _____

(Note: The information provided on this form may be shared with the minister you are evaluating.)

Please briefly describe your ministry role (involvement or interactions) as it relates to this staff member during the past year.

Please provide your feedback regarding the minister's performance for each item listed below by circling the descriptor that best characterizes their performance during the past year.

(Note: For any item identified as poor or unacceptable include a description of the factors that have resulted in your assignment of this rating i.e. observed behaviors, comments, actions taken, etc...)

1. Leadership ability					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
2. Ability to recruit qualified lay leaders to ministries under his/her direction					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
3. Ability to provide necessary training to the lay leaders in the ministry					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
4. Organizational skills					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
5. Attention to important details					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
6. Follow up on important or urgent matters relating to ministries					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					

7. Provides appropriate guidance for ministries under his/her direction					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
8. Provides vision to the ministries under his/her direction					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
9. Provides accountability for ministries under his/her direction					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
10. Provides feedback or constructive criticism to lay leaders under his/her direction					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
11. Ability to provide biblically based direction and counseling to lay leaders					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
12. Tactfulness					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
13. Communicates and/or displays love and concern to those he/she works with					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
14. Communicates and/or displays love and concern to those he/she is ministering to					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
15. Integrity					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
16. Work ethic					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					
17. Control of emotions					
Excellent	Good	Average	Poor	Unacceptable	Unable to Assess
Comments:					

17. Has this pastoral staff member ever treated you in an inappropriate or unprofessional manner?

Yes ____ No ____ If yes, please describe...

18. What does this pastoral staff member excel at in ministry? What are his/her greatest strengths?

19. What one or two things could be changed about his/her job description that would bring him/her greater fulfillment and the church greater effectiveness?

20. What are his/her weaknesses? How does he/she compensate for them? How would you suggest improvement in these areas of weakness?

Please feel free to provide any additional comments in the space provided below:

Event Evaluation Sheet

DOCTOR
Overall Evaluation

Event Being Evaluated: _____

Date: _____

- Why did you come to the event? What were your expectations?
- What did you like best about the event?
- What suggestions do you have about how we can improve the event?
- How do you feel you are growing as a result of the event? What applications to your life do you have?
- Is there anything about the program/event that is upsetting you?
- Did you feel comfortable bringing your friends/family? Why? Why not?

Small Group Evaluation

DOCTOR
Overall Evaluation

Small Group Plan

Passage:

Date:

Write out an objective for the group meeting:

List key texts to read together and discuss:

How will you paint the historical picture?

List key themes to cover with cross-references:

List questions that may be raised by a group member and follow up Scripture you can use:

List creative ideas to use (game/drawing/chart etc...).

List illustrations from your life or from the Bible—other places where a character demonstrates a theme.

Make a list of questions to ask that will help you draw out the group's observations/interpretations of the Scripture:

List questions for application:

Evaluation:

How did I meet my objective?

How are specific applications being made?

What went well? What didn't? How can I improve?

Staff Position Description

DOCTOR
Overall Evaluation

Name:

Date of Employment:

Review Date:

Title of Position:

Purpose Statement of Position:

Person Reports to:

Relates Closely with:

People For Whom Responsible:

Continuing Responsibilities:

Primary strengths/gifts/talents:

Role Preference:

Top Three Current Measurable Priorities:

Budget Available: \$_____

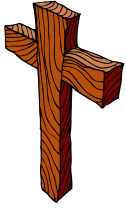
Time Required by Position: _____ hours per week

Salary \$_____ per year

Accompanying Benefits:

Volunteer Position Description

DOCTOR
Evaluation



Position:

Description:

Commitment:

**Characteristics
To Cultivate**

Ministry Skills

You will learn how to:

Life Skills

Specifics on the training and mentoring you will receive:

Relates Closely To:

Reports To:

Refinement

DOCTOR
Refinement

How can we be more effective and efficient in moving toward the ideal?

Process Chart

