



# PATHWAYS

— *for fruitful & healthy ministry* —

## COMMUNITY ENGAGEMENT

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# COMMUNITY ENGAGEMENT

A transformed world is a community where lives are changed, hope abounds, diversity is embraced, the spark of the Gospel is ignited, justice is for all, and all have the opportunity, knowledge, and skills to live to their full God-given potential. Communities of Hope further the mission by transforming the world.

(Micah 6:8, Luke 10:27)

## **Why engage in community ministry?**

People want to live in communities where they can prosper, learn, grow, feel safe and enjoy living. When this occurs, there is hope. Hope is a gift from God. Congregations in partnership with neighbors, community organizations, businesses, community leaders, and elected officials restore and grow hope by working together to create prosperous, safe, growing, joy-filled communities.

## **How does community engagement further the mission?**

United Methodists of Greater New Jersey (GNJ) are called to recruit and equip transformational leaders to make disciples and grow vital congregations for the transformation of the world. Community engagement leads to Communities of Hope. Communities of Hope transform the world.

## **Who should participate in community engagement training and planning?**

The Community Engagement training and planning process assists congregations and organizations to be more engaged in their community and leads congregations and organizations to become Communities of Hope and/or Hope Centers.

## **What are Communities of Hope and Hope Centers?**

GNJ Communities of Hope and Hope Centers are robust and comprehensive community engagement ministries. It is for congregations and organizations that want to become partners with neighbors, community leaders, community organizations, businesses, and elected leaders to develop the community. It is also for congregations and organizations seeking to become a Hope Center.

Congregations that want to develop one or two community ministries are better served through the Fruitfulness Module and focusing on the mission engagement vitality marker.

## **Biblical Foundation**

Build houses and live in them; plant gardens and eat what they produce. Marry and have sons and daughters; give your sons and daughters in marriage, that they may bear sons and daughters; multiply there, and do not decrease. But seek the welfare (shalom, hope) of the community where I have sent you into exile, and pray to the LORD on its behalf, for in its welfare (shalom, hope) you will find your welfare. For surely I know the plans I have for you, says the LORD, plans for your welfare and not for harm, to give you a future with hope. Jeremiah 29:5-7, 11

In the words of Jeremiah, community engagement is a commitment to the people and community where you are located. It recognizes that what happens to one happens to all and that leadership, plans, progress, and hope are not something that is imported but grows up from the community.

Biblically, community engagement is holistic, not addressing isolated issues, but seeing the interconnectedness of issues. Ultimately, God desires a future with hope for every community.

## The Ideal Team

Ideally, to engage in the community engagement learning, growing, and planning sessions a church needs to form a team of 8-12 people that includes eight congregational leaders who passionately care about the community and 4 people from the community. The people from the community should be neighbors as well as people who serve with a local community organization, school, or civic group.

## What participants will learn?

1. Biblical grounding to understand and develop communities of hope.
2. The Outward Mindset concept is that others matter just as you matter.
3. How to assess your community's assets, challenges, and opportunities.
4. The difference between social services/programs and systemic change/community transformation and how to work toward transformation.
5. What intercultural competence is and how to work with others so that we honor, respect, and engage cross-culturally and racially.
6. Organizing for community change and impact.
7. The importance of and how to develop partnerships and collaboration.
8. How to develop and implement strategic direction and a plan.

## Outcomes of Community Engagement Training and Planning

1. An understanding of the community, its history, culture, assets and challenges, and how to plan with the community for community change and impact.
2. An understanding of systemic change, intercultural competence, and how racism, sexism, and classism inhibit community development progress.
3. An understanding of intercultural competence and how to value, engage and include all cultures in the development.
4. 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.

## Learning and Planning Design

The community engagement module is a long-term commitment of 18 months to 2 years to vision, plan, and develop a Hope Center. Each session below will take a team between 1-2 hours of meeting time with some preparation in advance.

Training Session	Topic	Outcome	Assignments
Session 1	Biblical and mindset grounding	<ul style="list-style-type: none"><li>• Clarity of purpose and approach</li></ul>	<ul style="list-style-type: none"><li>• Share with the congregation about the community engagement team and the purpose for participating</li></ul>
Session 2	Intercultural Competence	<ul style="list-style-type: none"><li>• Ability to understand and engage cross-culturally</li><li>• Understand how race, gender, and class enhance community transformation and highlight areas for growth</li></ul>	<ul style="list-style-type: none"><li>• Identify how your team/congregation/organization exhibits intercultural competence</li><li>• Identify specific areas of growth in intercultural competence</li></ul>
Session 3	Community Assessment	<ul style="list-style-type: none"><li>• Assess community assets</li><li>• Understand how history and culture affects your community</li><li>• Understand your congregation's individual and collective assets</li><li>• Identify community opportunities and challenges</li></ul>	<ul style="list-style-type: none"><li>• Complete a community asset plan</li><li>• Complete the identification of community opportunities and challenges</li><li>• Complete an inventory/ assessment of individual team members and the congregation</li></ul>

Training Session	Topic	Outcome	Assignments
Session 4	Systemic change and community transformation	<ul style="list-style-type: none"> <li>• Understand systemic change and transformation</li> <li>• Understand the difference between systemic change and social services</li> <li>• Identify the systemic issues within the community</li> </ul>	<ul style="list-style-type: none"> <li>• Identify the transformation that is taking place in your community</li> <li>• Describe the systemic change and community transformation you hope to see in the future</li> </ul>
Session 5	Community organizing and strategic partnership	<ul style="list-style-type: none"> <li>• Ability to form alliances for action and impact</li> <li>• Understand why partnerships are important and how to develop partnerships</li> </ul>	<ul style="list-style-type: none"> <li>• Identify organizations and people you will partner with</li> <li>• Schedule introductory conversations with at least two identified potential partners</li> </ul>
Session 6	Strategic Plan-Vision and Mission Statements	<ul style="list-style-type: none"> <li>• A vision statement to provide strategic direction</li> <li>• A mission statement to provide what you will do and who you will serve</li> </ul>	<ul style="list-style-type: none"> <li>• Complete writing the vision statement</li> <li>• Complete writing the mission statement</li> </ul>
Session 7	Strategic Plan- SMART goals and action steps	<ul style="list-style-type: none"> <li>• Ability to write SMART goals</li> <li>• Ability to write actions steps that will achieve SMART goals</li> </ul>	<ul style="list-style-type: none"> <li>• Complete writing SMART goals</li> <li>• Complete writing your action steps</li> </ul>
Session 8	Strategic plan – budget and evaluation	<ul style="list-style-type: none"> <li>• A budget and evaluation plan to achieve goals and action steps</li> </ul>	<ul style="list-style-type: none"> <li>• Complete budget and evaluation plan</li> </ul>
Session 9	Communication and how to make progress and impact	<ul style="list-style-type: none"> <li>• How to communicate your plan to make progress</li> <li>• Steps to implement action and achieve goals</li> </ul>	<ul style="list-style-type: none"> <li>• Set dates for a monthly check-in</li> </ul>

## COMMUNITY ENGAGEMENT SESSIONS

### ■ **Session 1** **Grounding**

#### **Biblical Grounding**

*“These are the words of the letter that the prophet Jeremiah sent from Jerusalem to the remaining elders among the exiles, and to the priests, the prophets, and all the people, whom Nebuchadnezzar had taken into exile from Jerusalem to Babylon. Thus says the LORD of hosts, the God of Israel, to all the exiles whom I have sent into exile from Jerusalem to Babylon: Build houses and live in them; plant gardens and eat what they produce. Marry and have sons and daughters; give your sons and daughters in marriage, that they may bear sons and daughters; multiply there, and do not decrease. But seek the welfare (shalom, hope) of the community where I have sent you into exile, and pray to the LORD on its behalf, for in its welfare (shalom, hope) you will find your welfare. For surely I know the plans I have for you, says the LORD, plans for your welfare and not for harm, to give you a future with hope.” – Jeremiah 29:1-7, 11*

The Book of Jeremiah takes place in turbulent times, the people of Israel had been taken captive by the Babylonians, and the people were hurting and suffering. The people had been placing their trust in leaders who were telling them their situation would soon change. Jeremiah comes along with a message that their hope and future were in this place and that God has a plan to restore Israel to its wholeness in exile and through them, God will restore the welfare of the city.

The Hebrew word shalom is translated as peace, restoration, wholeness, prosperity, welfare, and well-being. It is used in Jeremiah to describe God’s intent for the community. The biblical concept of shalom community is based on the belief what happens to one happens to all, it is a community that focuses on sustainable communities where everyone prospers, grows, and multiplies knowledge, understanding, and service.

## Small-Group Questions

- How do you think the people felt about being asked to be a community of shalom in a time of such deep suffering? Why make plans in such uncertain times?
- The Israelites moved from exiles to settlers. Why was it important for them to establish themselves in the community?
- How might these instructions from God to invest in the community apply to your situation?
- Where do you already see God at work in your community and what are you facing as a community that you need God's plan for? How have you been seeking shalom for your community?

## Outward Mindset Grounding

With an outward mindset, we see others as people like ourselves, whose goals, objectives, needs, and challenges matter to us. With an inward mindset, on the other hand, we see others as objects whose primary value to us depends on the extent to which we think they can help us with our own goals and objectives (Arbinger Institute).

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 and 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 your neighbors and how do they value to God and the community?

How does what you see in your neighbors 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 you 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 people in your community if you have been helpful and gauge your impact.

## ■ *Session 2*

### **Intercultural competence**

Working together so that we honor, respect, and engage cross-culturally and racially.

#### **1. Understanding and working interculturally.**

Intercultural competency is defined as "the capability to shift cultural perspective and appropriately adapt behavior to cultural differences and commonalities." (idiinventory.com) It is the skill and ability to understand the cultural norms and behaviors of another and shift our way of thinking and practice to connect with another.

Scripture is filled with many pictures of intercultural competence from God calling Abraham to go from his home to become a “father of many nations” (Genesis 12) to the Holy Spirit breaking out on all cultures, nations, and peoples at the first Pentecost (Acts 2). However, the picture of intercultural competence demonstrated by Jesus is seen in his encounter with the Samaritan woman at the well.

Read together John 4:4-26

Jesus illustrated intercultural competency in a few ways with the Samaritan woman. He did the following:

- Saw the woman (Jesus asked her for a drink of water)
- Understood and accepted her background (a Samaritan, a woman with a “shameful” past according to society)
- Drew near to the woman talking with her
- Revealed his identity to the woman

## 2. Reflection on personal identity and culture

The transformation of the Samaritan woman at the well happened because Jesus was not afraid to fully see, understand, and accept her. Even though her identity and culture were different, Jesus drew near to the Samaritan woman and revealed his identity. As a result, the woman was able to fully see herself, understand and accept her identity and culture, and draw near to others revealing Jesus to them. The Samaritan woman’s revealing of Jesus to the townspeople (John 4:28) came only through her story, the word of her testimony, in her own language, background, and cultural perspective.

Our personal identities and cultures are integral to how we connect with God, others, and the world, for they are the vehicles through which experiences are shaped and stories are told. Sociologist Marshall Ganz's public narrative tool discusses three aspects of any public story – the story of self, the story of us (community), and the story of now (this urgent time).

The story of self is the narrative a person creates around their own personal identity and culture framed by the question “Why am I called to what I am called to?”

One’s story of self is created with 3 components:

- A specific challenge
- The choice made about how to deal with the challenge
- The outcome

The team may use the below diagram to begin reflecting on their respective personal identities and cultures and writing their ‘story of self.’



### 3. Understanding how race, gender, and class are critical to community transformation.

Based on Ganz's public narrative model, we can only begin knowing the 'story of us' (the community) and the 'story of now' once we understand our own identity which includes but is not limited to culture, race, gender, class, etc.

The 'story of us' is your narrative as a community of faith-based on the question "What are our shared purposes, goals, and vision?" Your 'story of us' needs to invite others to be part of the community.

Take a few minutes to answer the question "What are our shared purposes, goals, and vision?" as a faith community. The team may use the below diagram to begin reflecting on their collective identities as a community of faith and write their 'story of us.'



Finally, the 'story of self' and 'story of us' gives birth to the 'story of now' the Holy Spirit work of this present time or, as Marshall Ganz describes it, "The story of now invites people to join you in taking hopeful action on the pressing challenge." The 'story of now,' gleaned from points of commonality and difference in the stories of self and story of us is based on three aspects:

- The challenge the faith community now faces,
- The choices that need to be made and,
- The hope to which the community can aspire

Take a few minutes to write a 'story of now' based on the 3 items above.



It is important to note that stories of self, us, and now do not remain the same. They shift and change over time because people, communities, and challenges change over time like the movement of the Spirit. It is important to remember that communities must develop and learn a process, for their respective context, so these narratives can be created over and over.

## ■ *Session 3*

### **Assess to understand your community**

Many churches and organizations focus on community deficits and needs to inform their local ministries. This can lead to the widespread demoralizing belief that the community is filled with entrenched, unchangeable problems. In contrast, an asset-based approach focuses on the strengths, resources, and capacities of individuals, associations, and institutions in a community. By discovering, connecting, and mobilizing the human, social and political assets that are inherent in all communities, strategies to address community challenges can be developed in a way that fosters hope.

#### **1. What are the assets critical to community transformation?**

##### Activities

- Review of community statistics with conversation questions.
- Begin asset map

How to assess the community.

- a. What is the community's history and how has the community changed over the last 50 years? We honor the history and recognize how the community continues to change and evolve?
- b. How to map the assets in your community? Asset mapping – we build on assets.
- c. Who are the people in your community and what are their hopes and dreams? People and their hopes are important to us.
- d. What are the opportunities and challenges facing the community? We build on the opportunities and face our challenges.
- e. What are the associations and institutions within the community and how are they working together?

Assess to understand.

- a. What are the data and people telling you about the challenges and opportunities?
- b. What are the assets, experiences, and strengths you can build on?

#### Identifying a Manageable Geographic Area

Defining a geographic area where resources and energy will be focused is needed to increase impact and visibility. It may include a block, several blocks, or some specific portion of the community where there are both opportunities and motivated individuals who will work together. The objective is to identify an area no larger than can be managed and resourced.

The following questions may help your planning team define your geographic area.

Where are the assets (resources and strengths) located in your community? Examples could include:

- organizations valued by the community
- strong community groups
- public parks

- recreation centers
- city services
- organized block or community associations
- congregations that connect well with the community
- supportive businesses
- banks, etc.

Where in the community are there critical issues that need to be addressed?

- spiritual development,
- economic development,
- health and wholeness, and
- improving multicultural relationships

What portion of the community includes all of the following: (In an urban area, this may entail a one to four square block area):

- a manageable geographic area
- assets that can be built upon
- an area that is organized (or can be organized) and will energize the community.
- an area that is a place where you are willing to spend energy, time, and resources

## ■ **Session 4**

### **Systemic change and community transformation**

Transformation is the change from a condition of human existence contrary to God's purposes to one in which people can enjoy the fullness of life in harmony with God. (2015 Transform World). A healthy community calls for transforming systems that reinforce powerlessness to systems that foster responsibility, community leadership, and development. These systems have developed over a long period of time and enable or inhibit individual and community transformation and systemic change that leads to community transformation. True community transformation is accomplished when congregations, associations, and institutions develop common engagement strategies.

1. Systemic change.
  - a. What are systemic change and community transformation.
  - b. The difference between social services and systemic change.
  - c. Addressing race, class, and gender.
  - d. The root causes of poverty and how are they addressed.
  - e. Social change addresses one or more of the following: education, housing, employment, and leadership are core to systemic change.

#### Activities

- Identify the institutions and associations within the community.
- Identify ministry examples of how you and your church address the various causes of poverty.

Aspire to discern God's calling for your future.

- As we pray, listen and have conversation, what is God calling you to be/become?

## ■ *Session 5*

### Community organizing and strategic partnerships.

Community organizing is a process where people come together to address broken social systems and bring about long-term, meaningful change to people's lives and communities. Partnerships in community organizing acknowledge the strengths, skills, and resources of everyone in the community. These partnerships nurture and strengthen relationships through honest interaction and open engagement so that a collective vision is created for positive sustainable change.

Organizing for community change and impact.

#### a. Characteristics of Community Organizing

**Relational:** Develops and maintains one on one contacts. These relationships should be public relationships based on working together for a common goal.

**Pragmatic:** The community identifies what needs to be done.

**Winnable actions/issues:** Choose issues so that people experience success in the early stages of organizing.

**Consensus building:** Includes all groups (formal and informal) in the decision-making process.

**Developmental:** Committed to a process of discovery, research, action, reflection, and action.

**Structural and systemic:** Gives people the power to make decisions so systems can be changed and become more just.

**Consciousness-raising:** Raise awareness about issues globally and encourage action locally.

**Community-led:** Awaken, develop and train natural leaders to assume effective leadership from within the community.

**Proactive:** Think creatively towards the future, rather than a reactive and inactive approach to community issues.

**Initiative seizing:** Anticipates what will happen next and act upon that anticipation.

**Value-based:** Acts from the standpoint of faith, vision, and conviction in commitment to community

#### b. Process and steps for organizing

- How do you understand the problem or need that you are seeking to address?
- Why does the need exist and why is it unaddressed (or insufficiently so) in your community or a particular population in the community?
- What are the root causes? What conditions are creating the need?
- How are racism, classism, or other types of oppression operating through policies or practices that result in inequitable outcomes?
- Importantly, how has the service population been directly involved in shaping your understanding? (Meyer Voices)

Developing strategic partnerships and organization

#### a. "Building and maintaining strong interdependent relationships that advance the vision"

#### b. Process and steps for choosing partnerships

Community partnership requires the following

- Take time and effort to build trust, this is a process and not an event.
- Name one point of contact between teams for smooth communication.
- Be clear on vision and goals (use SMART goal setting and follow accountability measures).
- Consult with the persons you plan to serve and make sure your goals meet their needs.
- Be nimble, and be able to adapt if needed. Plan in advance how challenges will be addressed.
- Be the embodiment of the "good news" wherever you go.

Who are the participants in this community partnership? How will we keep them forefront of our planning?

Comprehend to understand.

- What do we now know that informs what we will now do?
- What are we already doing well 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?

## ■ **Session 6**

### **Strategic direction and planning overview.**

#### **Developing a strategic plan: Vision and Mission.**

Strategic planning is the process in which individuals identify how they will collectively move toward the future. For the congregation, it is moving toward God's vision of the community and congregation. Strategic planning is the process of discovering how people can work towards realizing hope in their midst.

1. Why develop a strategic plan?
  - a. A strategic plan creates clarity for direction, focus, priorities, and resource allocation.
  - b. A strategic plan has the following elements. Over the next few sessions, you will name these elements for your context.
    - i. Vision
    - ii. Mission
    - iii. Goals
    - iv. Action steps
    - v. Communication steps
    - vi. Budget
    - vii. Evaluating for impact

Developing a strategic plan: Vision and Mission.

#### **Vision**

What is vision and how does a vision statement help us move forward?

Vision – aspiring and dreaming of the preferred future.

- a. Why is vision important.
- b. How does vision emerge.

Draft a vision:

- a one or two-sentence description of what the community and congregation will become.
- a clear, concise, and brief statement that lends itself to understanding across differing levels of experience and education.
- a statement that describes what the community seeks to become.
- a guide for the plan and all activities that are to be carried out through the plan.
- the most quoted and often used statement of description or purpose.

As future ideas/directions are posed; they should be tested against the vision statement by asking the statement:

**Will this help us reach our vision?**

#### **Mission**

What is a mission statement, and how does it provide direction for all decision-making?

- a. Mission – the why, what, and with whom of your community engagement.

Draft a Mission

- lists the activity that will be carried out to accomplish the vision.
- states what will be done by whom: briefly and specifically.
- identifies and clarifies the participants, beneficiaries, activities, and anticipated outcomes.

As future ideas/directions are posed; they should be tested against the mission statement by asking the statement: **Will this help us accomplish our mission?**

## ■ **Session 7**

### **Developing a Strategic Plan: 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 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, that everyone can understand what you want to do.
- Measurable – It has something you will accomplish and often has a number associated with it.

- Attainable – 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 goal 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.

Convene to discern goals and actions following the SMART goal outline.

- What are measurable goals that will help us become more like God is calling us to be, and that build on our assets?
- What are the 3 actions for each goal you will take to accomplish each goal.
- What are your limitations, such as time constraints, finances, and resources available?
- What person, not a committee, will be the champion for the goal. A champion is someone who gathers a team together to accomplish each goal.
- Discern which goals are your top three. Some churches may have less than three 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.

Transform, 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?

**What are one to three measurable goals that will help us become more like God is calling us to be through community engagement?**

Below, list your goal(s), 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:**

\_\_\_\_\_

\_\_\_\_\_

Resources and Budget \_\_\_\_\_

\_\_\_\_\_

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:

Resources and Budget \_\_\_\_\_

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:

Resources and Budget \_\_\_\_\_

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 8*

### **Developing a strategic plan: budget and evaluation.**

#### 1. Resources and Budget

Resourcing and funding are necessary to bring about your project. You can create funding from grants, fundraising, and strategic partnerships. Resources are the gifts that people give to move forward the goals, this can be volunteers' hours to accomplish work as well as in-kind donations.

- Developing a budget.

The budget takes into account all the costs to fulfill the project. It is based on the total amount of money needed. Before you write for grants or look for strategic partners you need to have a realistic budget. A budget is also an important tool for your group in the evaluation process to assure that you are on track.

Take each action step

Estimate the expenses for each item. What do you need to do this well.

Do not guess get actual pricing for these expenses.

Consider the following areas when determining expenses

- a. Salaries: Will you be hiring anyone for this project?
- b. Training: Is there any specialized training that is required?
- c. Materials: What are the actual materials that are needed for this project?
- d. Professional Services: Do you need legal or other professional services?
- e. Capital Expenses: What changes might need to be made on your property to realize this goal.
- f. Promotional Expenses: How will the project be promoted to participants? For volunteers?
- g. Other: What additional insurance might you need? Are there any taxes? Approval costs?

Draft Budget: Add all your estimates together for all your action steps and draft into a budget.

- What are your resources?  
Resources are the gifts of time, talent, and donations that will offset your budget.
  - a. Get agreements for volunteers that will offset salaries and professional services
  - b. Get vouchers for materials.
  - c. Set volunteer days to make capital improvements.

Deduct these expenses from your draft budget. Add remaining expenses to determine the funds required to accomplish each goal.

Consider what contingency funds you need if resources do not materialize.

Where will the funds come from?

- Fund Raising
  - a. Combine fundraising with increasing awareness of the issues and goals.
  - b. Solicit gifts in kind from local big box stores as well as merchants and professionals.
  - c. Time is valued equally to money.
- Grant Writing
  - a. Look for local government, corporations, and foundations that offer grants in your local or the need you are meeting.

## 2. Evaluating your progress and impact.

Evaluation is critical to the ongoing success of the plan. Through evaluation success can be built upon, failures can be learned from, and mid-course corrections can be made.

Evaluation does not circumvent the fundamental focus of achieving the vision. Every evaluation should consider if the vision is being met.

Why is evaluation important?

- determine progress
- assess what went well and why
- use assessments to deploy the same successful procedures in the future
- determine what did not go well and why, so that corrective or alternate actions will be taken in the future

Steps to Evaluate your progress:

1. Focus on the one key goal – What is the one goal that is essential to achieve with excellence?
2. Act on lead measures - What are the 2 or three influenceable items that can impact your goal?

Lead measure tests:

- Must be predictive of achieving the goal

- Must be influenceable by the team  
Lead measures are the most difficult aspect of moving your goal forward.
  - In general, we are used to looking at lag measures.
  - They can be hard to track.
  - They can look simple with a precise focus on a single behavior. (Four Disciplines of Execution)
3. Keep a compelling scoreboard – How will you track your progress so you can communicate it to the team and the congregation?
  4. Create a cadence of accountability – How will you meet regularly to focus on progress, make adjustments, and celebrate successes.

Suggested accountability meeting structure:

- Share one story of life or community transformation
- Review last month's statistics. What are we noticing and learning?
- What new thing did we try this month? How did it work?
- What project/initiative are we planning for the future? Updates?
- When will you meet again?
- How are you tracking your progress?

This should be done separately from any other work;  
this happens 2 times a month (virtually) for less than a ½ hour.

## ■ **Session 9**

### **Communication and making progress**

For your project to be successful, it must be promoted to both those who will benefit from its goals as well as potential partners.

1. Communicating for progress
  - a. Who is your target audience? You might need to divide your audience into segments for the most effective communication.
  - b. How will your project be branded?
  - c. Make it relevant to the targeted audience, tailor it to your group, and be culturally relevant.
  - d. Be selective and strategic in how this is communicated.
  - e. Use multiple platforms, both free and paid advertising. Mix digital and in-person kinds of promotion.
  - f. Consider who influences your target audience and encourage their partnership.
  - g. Request feedback after promotions to see how the community is perceiving your work.
  - h. Leverage your partnerships.

Evaluating your communication techniques:

- Does it tell your story?
- Has it raised awareness?
- Has it attracted new support?
- Is it in line with your vision and mission?

2. Implementing the plan and achieving results.
  - a. Make sure that you have fresh volunteers who are ready to implement your project after all the work required to prepare.
  - b. Plan in advance how you will thank all those who are supporting your work.

Are you meeting your vision? Are you accomplishing your goals?

<sup>i</sup> DISCLAIMER: This mindset practice used in this guide synthesizes, adapts, and contextualizes the principles, and best practices presented in the book *The Outward Mindset: Seeing Beyond Ourselves* by Arbing Institute, 2016 The Arbing Institute.

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<sup>ii</sup> Adapted from *Empowering the Poor: Community Organizing Among the City's "Rag, Tag and Bobtail"* by Robert Linthicum.

<sup>iii</sup> DISCLAIMER: This accountability practice used in this guide synthesizes, adapts, and contextualizes the principles, and best practices presented in the book *The 4 Disciplines of Execution* by Chris McChesney, Sean Covey, 2011 Simon & Schuster.

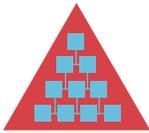
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## Appendix

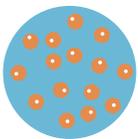
### Appendix 1

#### Change: Triangles and Circles

Change is inevitable but transformation is optional. Stumbling blocks to both personal and community transformation are often found in the systems that operate in communities. These systems have developed over a long period of time and either enable or inhibit individual and community transformation.



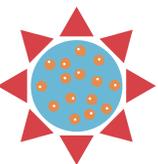
There are two types of systems at work – triangles and circles. Triangles are used to represent institutions within the community. Institutions often operate in a hierarchical manner in which decisions are made at the top and carried out by others in the community. Rarely is there input from the community about those decisions. In communities, institutions are schools, police precincts, banks hospitals, social agencies, and other governmental and community groups. Most of the time, institutions employ people who do not live in the community. Their connection with the community is through their job. When they employ people within the community, these people sometimes form an elite hierarchy.



Also at work in communities are circles. Circles represent associations. These are often small informal network groups that help to develop and sustain community life. Associations are block clubs, boys and girls clubs, sports leagues, congregations, community organizations, neighborhood/town watches, business service clubs, school PTA's, etc. In most cases, these groups are volunteer organizations and their membership resides in the community.

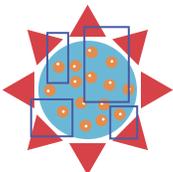


Institutions, in their desire to help, tend to take on more responsibility for meeting community needs. Their desire to help has created a system of dependency and disempowerment. Their assuming more responsibility for the community's wellbeing often squeezes out the associations.



In a community that functions well, associations (circles) operate at the center of the community and carry out important activities, while institutions (triangles) operate at the fringes and offer resources, experience, and services that enable the community to function as a whole and to develop leadership within the community.

This calls for transforming the system from one that disempowers the community to one that fosters responsibility, community leadership, community development, and transformation. This type of systemic change is not easy. History, tradition, and power are invested in the old system.



Transformation change of this kind is accomplished when congregations, community associations, and institutions develop common strategies (boxes) to work together for transformation.

## Appendix 2 Proposal Writing

### Introduction to Proposal Writing

Component	Content	Length
Executive Summary	Umbrella statement of your case and summary of the entire proposal Include contact information	1 page
Statement of Need	Why this project is necessary	2 pages
Project Description	Nuts and bolts of how the project will be implemented and evaluated	3 pages
Budget	Financial description of the project plus explanatory notes	1 page
Organization Information	History and governing structure of the non-profit; its primary activities, its audiences, its services	1 page
Conclusion	Summary of the proposal's main points	2 paragraphs
Additional Information	Back-up data, references, etc.	Only As needed

1 Geever, Jane C., Guide to Proposal Writing, Third Edition. The Foundation Center, 2001.