

THE
DISCIPLESHIP
PLACE

Developing Children's Ministry



SESSION 12

Developing a Strategic Plan, Calendar,
and Ministries Budget

NOTICE TO CLT PARTICIPANTS AND EDUCATORS

This is a contract. By using these materials you accept all the terms and conditions of this Agreement. This Agreement covers all Leader's Guides, Student Guides, and instructional resources included in the Continuing Lay Training (CLT) website.

Upon your acceptance of this Agreement, Continuing Lay Training grants to you a nonexclusive license to use these curricular materials provided that you agree to the following:

1. USE OF THE MODULES.

- You may distribute educational materials in electronic form to students or other educational providers.
- You may make and distribute electronic or paper copies to students for the purpose of instruction, as long as each copy contains this Agreement and the same copyright and other proprietary notices pertaining to the Module. If you download the educational materials from the Internet or similar online source, you must include the CLT notice for the Module with any online distribution and on any media you distribute that includes the educational content.
- You may translate, adapt, and/or modify the examples and instructional resources for the purpose of making the instruction culturally relevant to your students. However, you must agree that you will not sell these modified materials without express, written permission from CLT.

2. COPYRIGHT.

The material is owned by CLT and is protected by United States Copyright Law and International Treaty provisions. Except as stated above, this Agreement does not grant you any intellectual property rights in the Module.

3. RESTRICTIONS.

- You may not sell copies of these educational materials in any form except to recover the minimum reproduction cost of electronic media or photocopy expense.
- You may not modify the wording or original intent of the educational material for commercial use.

THANK YOU

Continuing Lay Training would like to thank Clergy Development for granting permission to modify and adapt their course of study materials for our educational purposes. Their willingness to partner with us is sincerely appreciated.

Developing a Strategic Plan, Calendar, and Ministries Budget

SESSION OVERVIEW

What is a Strategic Plan?

Planning a Ministry Calendar

Budgeting Ministry

Application

Exam

Discussion Guide for Mentor and Participant

LEARNER OBJECTIVES

At the end of this session, you should:

- understand how to develop a strategic plan for ministry.
- understand how to plan a ministry calendar.
- understand how to establish a budget for ministry.

Developing a Strategic Plan, Calendar, and Ministries Budget

INTRODUCTION



A pastor once led a workshop where he came walking in with two of his youth carrying a huge banner that said, “Follow Me.” As he and the banner moved past participants, the attendees were able to read the back of the banner, which said, “But I don’t know where I am going.” He explained that this activity illustrates how many ministers operate their ministries. This is true for some children’s ministries as well. children’s ministry needs to reflect a strategic, organized, and resourced ministry. It is not enough to plan activities with children; there must be intentional ministry. Strategic planning, calendaring, and budgeting must come into play.

Earlier, we developed a vision statement and used it to evaluate programming. How will we use such a statement to “plan” for our future in ministry? We need to be able to verbalize our vision and paint the picture in such a way that everyone involved can share in that vision. Not everyone will agree with our vision; however, it must be a clear vision so that those who have a different perspective can at least understand our goals. In addition, we need to demonstrate how our vision will be lived out through leadership. The challenge of demonstrating our vision surfaces through strategic planning, calendaring ministry, and budgeting resources that helps leaders and volunteers alike implement the vision.

WHAT IS A STRATEGIC PLAN?



NOTES

A strategic plan provides a detailed, goal-oriented, strategy for our ministry. Our plan must be from God. God calls, guides, and equips ministry. We can attempt to manufacture our plan through our own efforts, but we will find the plan lacks the power and anointing to inspire others and complete our goals. After asking God for direction in our ministry, we need to pray for direction and guidance.

A strategic plan emerges as a clear response to these questions: Where are we going? Where do we plan to be at the end of the year? What is the ultimate place we want to be in this ministry? The plan incorporates the following elements: our philosophy (how ministry to children should be accomplished), our vision (the big dream for what our ministry will look like in the future), our mission (the big goals of what our ministry will accomplish), and our consideration of the overall mission and vision of the church. With these elements in mind, we can craft a direct plan of action for one year, three years, and five years in the future. Remember, a sound strategic plan will inspire others, as well as attract leaders and families to join the ministry.

We can develop a strategic plan for children's ministry through several practical steps. First, after being quiet before God, write all the words you hope will be used to describe your children's ministry in three to five years. Next, list the qualities you want visitors to notice about the children (kind, fun, excited about Jesus, great worshipers). List the types of leaders and the number of leaders you will need. Begin to dream and list the new ministries that will emerge. Write how you plan to evangelize the children in the community. List the service opportunities you can provide for the children. Describe what the relationship with the parents will look like. Finally, include in the plan opportunities for leadership development.

After looking over the lists, consider how these dreams can become a reality. At this point, let God help refine the plan. Most leaders come to ministry with some knowledge of what is critical in ministry to all children. However, every church is unique and requires a tailored approach. There is usually a program already in place when you first come to a church. Even if there isn't, there are expectations on the part of pastors and laity. Obtain information from those who have been working with the children and who have a particular interest (such as parents). Talk with those who have served in ministerial leadership with the children recently and the senior pastor. Allow their thoughts and concerns to inform the creation of the basic strategic plan. Are there things that should be added, subtracted, or modified?

 **NOTES**

Once we have evaluated all the input, we need to think in terms of one-year, three-year, and five-year blocks. Ask, "What is the greatest priority for this children's ministry?" We need not accomplish everything immediately. We will do better if we proceed with intent and energy. Bring other people into the conversation to help sort through all the ideas. Think how these plans connect with the other ministries in the church. Do ideas connect to the overall vision of the church? Eliminate ideas that do not seem reasonable for implementation based on one-year, three-year, or five-year planning. For each feasible idea pursued, develop an action plan. Within an action plan, include:

- Reasonable timetables
- Anticipated barriers and ideas for overcoming each barrier
- The number of people necessary to accomplish ministry plans
- Potential cost

The senior pastor should have the opportunity to evaluate the strategic plan in the context of the overall strategy. Other leaders provide valuable wisdom; even children can offer perspective to planning. When the plan is complete, place the final draft into written and/or visual form and share it with all the interested parties.

This strategic plan serves merely as a plan. The plan should be flexible and dynamic. As we become immersed in ministry and children's lives, the plan may need to roll and bend. Foundations remain unchanged but contexts and interpretations of what is needed might change. The plan serves as a map to provide direction to ministry. Well-crafted plans prevent leaders from getting distracted by side roads that look interesting but may not lead to the ministry's destination. However, it is not unusual to find more efficient ways to get to our destination as we adapt to contextual changes. When changes prove necessary, we may need to alert leaders about the adjustments well ahead of time.

PLANNING A MINISTRY CALENDAR



NOTES

Children's leaders often realize the challenge of planning ministry when they set out to create a yearly calendar and stare at the 365 blank squares with the task of filling in the dates! This process can seem intimidating unless we have a plan on how to proceed. Leaders will find a number of ways to plan a calendar.

- Obtain the ministry calendar from last year and fill in the same activities adjusted for the different dates.
- Obtain a calendar from another church in a similar setting and copy the activities on the new calendar.
- Use a general gathering of children and families to find out what they would like to do during the next year.
- Fill the calendar with all kinds of activities. However, trying to be everything to everybody usually ends up in failure and burnout in less than one year.

Unfortunately, following the previous procedures almost insures that ministry will be ineffective and fail to meet the needs of the children. Instead of these approaches, try to combine *some* aspects of previous experience, add suggestions from other ministries, and use ideas from others on the leadership team. These approaches are legitimate resources for calendar planning. Remember that each church remains unique to its setting. Your church may choose fewer regular activities and more special events, so plan activities to match ministry goals.

Practical Steps of Calendar Planning

There are practical steps to creating a working calendar that meets the need of ministry. First, place all the previously-expected activities on the calendar first. These might include the following:

- Local church dates (revivals, all-church picnic, holiday services and activities, and other age-level ministry schedules, such as VBS and children's week)
- Weekly events (Sunday school, children's church, Caravan, Bible Quizzing)
- District church dates (children's camp, camp meeting, retreats, and conferences)


NOTES

- Community or school dates (first and last day of school, spring and fall breaks, sports tournaments)
- Family dates (birthdays, vacation days)

Second, create a seasonal schedule. Each season should possess a specific focus or goal unique to that time of year. The following suggestions are general and will vary based on global or local standards, but will give leaders an idea of what such a schedule should look like.

- Late summer: Focus on recruiting and training volunteers.
- Fall: Focus on building relationships and creating the group norms and group identity.
- Winter: Focus on personal development and leadership development (Bible Quizzing, worship team practice, drama team practice).
- Spring: Focus on celebrating the year's accomplishments and preparation for VBS, camp, and summer service opportunities.

Third, begin to shape and mold the specifics within this framework. Remember to be clear about the purpose of any event to stay within the vision of the ministry. Also, keep purposes and activities on track with others in the church.

Fourth, decide the patterns for recurring activities. For example, the ministry may conduct an activity the first three Saturdays of each month from 5:00–8:00 pm. The first Saturday of each month reaches preschool children and their parents. The second Saturday serves first through fourth graders. The third Saturday addresses preteens. Other examples may include Preteen Discipleship every Thursday afternoon or Mom's Day Out (a preschool ministry) each Tuesday morning. Decide on annual events, such as a fifth- and sixth-grade service project or a family retreat. Mark the time for staff training days and parent education events that do not directly involve the children. Keep in mind that the ministry calendar is not the only schedule children have to deal with. They also have sports events, lessons, school calendars, and family commitments.

Communicating the Calendar

After obtaining approval for the calendar, distribute it to everyone in the church to avoid any last-minute conflicts that could put the events in jeopardy. Leaders may distribute the information through a newsletter to provide important dates for the coming month. Leaders may list each week's activities in the church bulletin on Sundays or keep an updated bulletin board that lists the events for



the year. If the church maintains a website, have a page that lists the year's events and then the week's events with all of the details included. Leaders may provide a letter to parents each week to explain the week's activities. These strategies may seem redundant. However, people gather information differently. Most people need information reinforced in order to follow through. Multiple methods of communicating provide interested people every possible means to obtain needed information, and reminders as events approach.

BUDGETING MINISTRY



NOTES

A ministry budget should reflect, not drive, the ministry's vision. This principle implies that how we spend money reveals what is important to children's ministry. The budget reflects values and philosophy of ministry. However, when programs find themselves hampered by money problems, then money begins to dictate which activities remain important and how leaders can proceed.

It is not possible to provide a comprehensive guideline that shows where to allocate money and how much each budget item will receive. Every church and every program is unique and possesses specific needs and resources. Therefore, we will look at guiding principles that often govern good budgeting and money management.

A budget is basically a financial plan of how to fund ministry. Budgeting helps analyze ministry needs, prioritize finances, and manage resources. Most ministries incur three basic types of expenses: fixed, variable, and one-time expenses. Fixed costs require payment of the same amount at the same time. It is easy to plan for fixed costs. Most ministries rarely find themselves directly responsible for many fixed costs. Variable costs describe commodities purchased time and again, but based on variety in quantity, price, and time of purchase. This category often includes such things as teaching materials or transportation costs. Ministries often estimate these variable costs to the best of their ability. We may want to err on the high side of the costs to allow a margin for error. One-time costs represent items you purchased once over several years. Sometimes, these expenditures might be called "capital costs." The costs may include more expensive items such as computers, copiers, or projectors. Ministries often try to set aside a small portion of yearly budgets to either prepare for purchase of such items or for unexpected expenses, such as repairs to major pieces of equipment.

Steps in Developing a Budget

Leaders may employ several steps in developing a working budget. First, look at the ministry's financial history or a comparable ministry within the church. This analysis often answers some key questions:

- From where does the money come?
- Where has most of the money been spent in the past?
- What types of fundraisers were used to bring in money?


NOTES

- Which fundraisers appeared to be successful and which ones were less profitable?
- What are the annual events that need to be funded?
- Were there ever registration fees?
- What past budget items can be eliminated?
- What should be added to reflect the new ministry plan?

Second, the ministry's values should be reflected in the budget. If training staff is a priority, then the budget should reflect training costs. Upgrading safety procedures requires leaders to account for those costs. Don't get so caught up in restocking minor resources that the ministry lacks a budget for important development of the ministry.

Third, find out how the financial process works. Can the ministry purchase supplies when needed? Do leaders use their own money and later seek reimbursement, or does the church possess accounts or an institutional credit card? Is there petty cash available for urgent needs? Who writes the checks, and what is the request process? Does the church use purchase orders? Are ministries free to select preferred vendors or does the church have an established relationship that needs to be honored? Do ministries incorporate additional purchases into next year's budget? Do parents pay for any of their children's involvement or do ministries independently raise all the money for each event?

Fourth, the key to financial success revolves around developing an accurate budget, managing it well, and keeping a constant, close watch on spending. Leaders may need to read monthly reports carefully to make sure the ministry remains on track with projected costs and revenues. Leaders may need to prioritize some requests, even saying "no" to some desires so that leaders possess the funds to say "yes" to other needs.

Budget Guidelines

When preparing a budget for your ministry, you might follow these guidelines. Be accurate in estimating of costs. It may be tempting to overstate budget needs in case the board or finance committee has to reduce the final amount. However, falsifying budget needs raises an honesty issue, and dishonesty has no place in a Christian's life. Being as accurate as possible will help the board see exactly how reducing funds will affect ministry. Be honest and trust God.

 **NOTES**

Be wise in purchasing. Look for bargains, but be careful. We normally get the quality of the goods we pay for. Buy materials in bulk when possible. This practice helps leaders become good stewards of resources by saving money. Leaders may actually buy more materials while earning the trust of those overseeing the ministry. Be wise about quality and durability when purchasing furniture, toys, and sports equipment. A larger investment for quality merchandise may save money in the future. Indicate materials and equipment for a new program that functions within other settings. Determine what equipment would be usable in other programs.

Be aware of complex and highly technical equipment (or programs) that can be operated only by one or two people. This purchase may leave the church in trouble if those competent to operate the equipment are not available. Be aware of the need for training for any new technological advances and allow time for the "learning curve."

Make items needed for safety and security a priority in the budget. The best program in the world can be destroyed if a child is seriously injured. Do not sign contracts with anyone until leaders know exactly what they are getting. This practice includes speakers, musicians, caterers, and the rental of facilities or equipment. Make personal contact with those involved to clarify what the ministry actually obtains for its money. Don't just assume; practice diligence and look for hidden costs.

Develop a strategy for filing and submitting receipts. A rule of thumb in some larger churches is to have a ministry hold receipts until the ministry possesses either \$100.00 worth of expenses or 10 receipts. Have a specific place to keep receipts until the ministry completes a reimbursement requisition form. Most ministries rarely hold on to receipts longer than 30 days. There is too much risk of losing or forgetting them.

Ask questions of the people responsible for budget development. Ask a technician about the need for the proposed video equipment and if there are other factors you need to consider. Talk to an accountant concerning any bookkeeping questions. It is better to be humble and ask questions than to make a big financial error that will have negative consequences for the church.

Keep a file of personal financial documents. Make copies of receipts and any forms submitted. This practice anticipates future problems if questions emerge about spending or if the originals get lost. Following is a list of possible expenditures that provide an idea of what is involved in maintaining a multifaceted children's ministry:

 **NOTES**

- Salaries
- Travel expenses
- Rental equipment
- Staff development
- Educational materials
- Craft and other supplies
- Phone
- Promotion/advertising
- Printing
- Envelopes, stamps, and postage
- Insurance
- Food
- Hospitality
- Repairs
- Music
- Retreat Speakers
- Miscellaneous

Small Budget Ministries

Leaders often struggle and wonder what to do if there is little money to start a ministry. Dean Blevins and Mark Maddix, in *Discovering Discipleship: The Dynamics of Christian Education*, offer some words of advice and caution for smaller-member churches.

In addition to assigned budgetary items, ministers should also investigate other revenue sources within and beyond the congregation. Often Sunday school ministries contain resources for weekday ministry when used judiciously, worship ministries may supplement age-level music programs, and building maintenance may have resources for updating technology or replacing a church bus. Locating such sources may help stretch a budget. Beyond these resources, Christian educators should be cautious how they raise funds from within a congregation.

**NOTES**

When possible, ministers should focus fundraising efforts on populations beyond the immediate church. Too often fundraising events place undue pressure on parents and parishioners to fund extra events, increasing their obligation to the local church (328). Make requests available to the congregation for donations, or borrow items such as audio and video players. Call other churches and let them know if leadership is starting a children's ministry with very limited resources. Ask if they have any equipment or materials they are not using that they would be willing to donate or loan. Many larger churches have accrued a number of items in storage they never plan to use. Ask the local schools if they have any equipment they would be willing to donate. A theater group may have some props they would donate. If a church has qualified drivers, another church may loan their vans for an activity. Be creative, and do not be afraid to ask for help.

Our strategic plan, calendar, and budget should align with our vision for ministry. All three tasks require a collaborative spirit with other leaders. The tasks require that we carefully discern God's intent for children's ministry. Our context may place certain restrictions, but it will also offer creative opportunities. Ultimately, we trust that careful planning, calendaring, and budgeting will result in a faithful ministry.

APPLICATION

**NOTES**

1. Discuss with church leadership the current strategic plan for children's ministry. If no such plan exists, ask what might be included.
2. Review the church calendar and discuss with parents their opinions of the current schedule.
3. Review the current budget for children's ministry in your church. Discuss with leadership how much of the budget is fixed, variable, or one-time expenditures, and how they develop the budget at the church.

EXAM

**NOTES**

1. Strategic plans include:
 - A. Our vision.
 - B. The overall church plan.
 - C. The big goals for our ministry.
 - D. A and C.
 - E. All of the above.

2. Strategic plans are very detailed and goal-oriented.
 - A. True
 - B. False

3. Strategic plans normally work in one-year blocks.
 - A. True
 - B. False

4. Calendars should include all the plans of activities from previous years in addition to new ideas from local churches and family input.
 - A. True
 - B. False

5. Elements to calendar planning include:
 - A. Weekly events.
 - B. Local and district church events.
 - C. Community and family events.
 - D. A and C.
 - E. All of the above.

6. People usually only need one version of the calendar.
 - A. True
 - B. False

7. A budget is basically a financial plan of how to fund ministry, but also an indicator of priorities in ministry.
 - A. True
 - B. False



8. A budget is good as long as:
 - A. We keep an accurate accounting.
 - B. We know how the finances work in our context.
 - C. We stick to our values.
 - D. A and C.
 - E. All of the above.

9. Always look for the cheapest option when purchasing.
 - A. True
 - B. False

10. One of the primary resources we should always approach for support are people within our congregation.
 - A. True
 - B. False

DISCUSSION GUIDE FOR MENTOR AND PARTICIPANT

**NOTES**

Be prepared to discuss the following with your mentor.

1. What are the strengths and limits of having a strategic plan?
2. Do we have a sound calendar or do we try to do too much or too little based on a lack of calendar planning?
3. How does our current budget reflect our priorities?
4. How can we responsibly draw from resources within the church while also seeking support from a wider community?

Review your answers with your mentor, then respond to the following:

How many responses focus on supporting children (particularly in areas where they are not yet fully self-reliant), and how many answers focus on empowering children?

Which of these answers support the goal of living Christlike relationships? Why?

What do we need to add to our list to make our approach more comprehensive, more faithful? Which do we need to incorporate into the role of the children's leader as one who both supports and empowers Christlike relationships with children?