



ACTION STEP 1: VALUES & VISION RETREAT



Who?

Marketing Plan Team members will participate in a Values & Vision Retreat.



How long will it take?

Planning: Two to three weeks.

Retreat: Three to four hours.



Why?

- Celebrating and reflecting on history and current successes helps us hone in on what is important to our church.
- Discovery of values needs to be a collective process. Bringing many leaders together will help us identify the four to five values that are CORE to who we are.
- To bring leaders together for vision clarity and unity.



What will I Accomplish?

- Through the process of celebrating and discussing church moments, people, actions and decisions, the team will uncover values that are core to the church.
- The team will reflect on where the church has been and in what direction it is heading so they can clarify and unify around the church's vision.

Preparation

The Marketing Plan Coordinator will plan the agenda and coordinate logistical details. Everyone will come to the retreat having worked through their **Homework 1: Values** and **Homework 2: Vision**, which will help stimulate their thinking and prepare them for each of the retreat's components.

Process

- **Open in prayer (5 min.):** Pray for clarity and unity around your church's values and vision.
- **Focus the team (10 min.):** On how you got to this meeting (your **MARKETING PLAN** process), and the opportunity you have today. Review key points from **Homework 1: Values** and **Homework 2: Vision**. If participants have significant questions /concerns/comments from the homework, make note of those on a flip chart, but don't take the time to address and answer all of those at this time. As the retreat draws to a close, revisit the list to see if those questions/concerns/comments have been addressed.
- **Values (90 to 120 min.):**
(If your team is more than 10 people, break the group down into smaller groups of 5 to 8.)

Facilitator asks each group to take one hour to discuss the following. (Don't write anything down yet.)

- What is your most meaningful memory of the church?
- What positive stories have become "larger than life" at this church?
- What other symbols (facilities, property, regular events, rituals, etc.) have particular meaning to our people?
- What are the things that are drawing new people to the church?
- What decisions (especially difficult ones) has the church made that were particularly good decisions in recent years?

Facilitator asks each group to spend 20 minutes discussing the following. He/she provides examples of other church's Core Values (see resources).
(The group will write these take-aways on posters to share with the larger group.):

- Based on the previous discussions, what are the most predominant themes that emerged?
- Narrow that list down to four or five key themes.
- Write those themes as Core Values.

Facilitator brings the larger group together to report on their values. Facilitator then works to find consensus among the group to prepare four to five Core Value statements. *(This will become **Step 1: Values & Vision Deliverable.**)*



Step 1: Deliverable

Write the following into your master **MARKETING PLAN** Worksheet

_____ church's **Core Values** are:

- _____
- _____
- _____
- _____
- _____

Facilitator then asks the groups to take 20 minutes to discuss the church's demographics based on values and demographics/behaviors reflections. The group will write four to five key demographic traits of the congregation based on this discussion. *(The group writes these on posters to share with the larger group.)*

Facilitator brings the larger group together to report on their demographic findings. Facilitator then works to find consensus among the group to prepare four to five key demographic traits. (This will become this section's deliverable.)

Portions of this exercise come from TAG Consulting and the book "Transforming Church" by Kevin Ford. Used with permission.



Step 1: Deliverable

Write the following into your master **MARKETING PLAN** Worksheet

Demographics: The people of _____ church are:

- _____
- _____
- _____
- _____
- _____

▪ **Vision (60 to 90 min.):**

Facilitator asks each group to take one hour to discuss the following. (Don't write anything down yet.)

- **What two or three key things do you want your church to be known for?** (E.g. a safe and relevant place to explore faith, many activities for kids to be challenged and grow, extreme generosity to the poorest nations.)
- **If your church closed its doors, what would your community miss the most?** (E.g., biblical teaching, counseling, basketball program.)
- Share the picture or description you prepared of what the church would look like in five years (from Vision homework).
- Take some time to compare perspectives and discuss the common ideas that surfaced.
- Select one picture/description or draw/write a new one that most closely reflects the consensus among the group.

Facilitator brings the larger group together to report on their vision concepts. He or she asks the collective group to work toward consensus on identifying the shared concepts and focal points, challenging them to hone in as specifically as possible.



STOP!

Are you unified? Working toward consensus takes time. However, if the leaders are discovering roadblocks during this step, go back to the STOP for resources on how to clarify and unify.

Facilitator then asks each group to spend 20 minutes drafting a church vision statement based on the shared concepts and focal points (or discuss how the church's current vision statement supports these concepts).

Facilitator brings the larger group together to share their statements. Facilitator then works to find consensus among the group to prepare the church's vision statement. *(This will become this section's deliverable.)*



Step 1: Deliverable

Write the following into your master **MARKETING PLAN** Worksheet

_____ church's **Vision Statement** is:

▪ **Key Messaging/Elevator Statement (30 to 45 min.):**

Facilitator asks each group to spend 20 minutes creating a Key Messaging/Elevator Statement. Drawing from the deliverables on your **MARKETING PLAN** so far:

- Core Values
- A description of the people in your church
- Vision Statement

Develop a description of your church in the time it takes to ride an elevator down from the 20th floor (no longer than 60-90 seconds). (Write description on large paper to share with the group.) If you and your team are unfamiliar with the Elevator Statement concept, an internet search on "Elevator Statement" will provide dozens of resources and examples.

Facilitator brings the larger group together to share their statements. Facilitator then works to find consensus among the group to prepare the church's Key Messaging/Elevator Statement. (This will become this section's deliverable.)



STOP!

Is it clear? Having this many people developing a single message takes time. However, if the leaders are discovering roadblocks during this step, go back to the STOP for resources on how to clarify and unify.



Step 1: Deliverable

Write the following into your master **MARKETING PLAN** Worksheet

Key Messaging/Elevator Statement Deliverable

Write the following into your **MARKETING PLAN**

_____ church's **Key Messaging/Elevator Statement** is:

This is the end of **Action Step 1: Values & Vision Retreat**. You may want to revisit the list of questions/concerns/comments that participants may have had at the beginning of the retreat to see if they have been addressed. In the coming days, direct your team to begin work on **Step Two: Perception & Needs**.