

## Mission Driven Budgeting – Adopting the S.O.A.R. Budget Model



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## About Miller Management



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Our mission is to provide **Expertise** that brings **Clarity** to finances enabling leadership to have **Confidence** in decision making.

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\*Level of service is determined by the size of the organization and their specific needs

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- ❖ 6 Essentials of Church Financial Management
- ❖ 5 Keys to Using Your Financial Data
- ❖ Ministerial Taxes – Know and Understand the Basics
- ❖ How to Build an Accountable and Effective Counting Committee and Counting Process
- ❖ Aligning Kingdom Resources for Effective Ministry - Purpose-Driven Budgeting
- ❖ Church Treasurer/Church Administrator 101
- ❖ How to Hire, Motivate, and Release Staff - Paid or Volunteer
- ❖ Discovering, Valuing, and Working with Diverse Personality Styles
- ❖ Building Effective Relationships with Staff and Congregation Members
- ❖ How to Become an Effective Agent of Change
- ❖ How to Build and Maintain Effective Ministry Teams
- ❖ Enhanced Problem-Solving and Creativity in Ministry
- ❖ Effective Personal, Team, and Organizational Communications
- ❖ Results-Oriented Conflict Management
- ❖ Church Administration Resources

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Listen in every Tuesday to the  
**Leadership and the Church podcast**  
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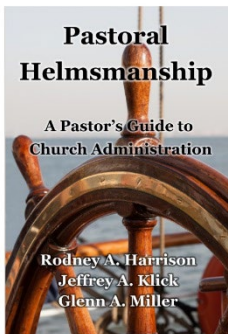
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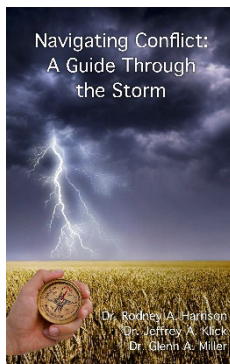
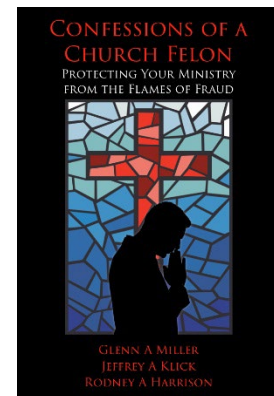


**Pastoral Helmsmanship** is a tool that every pastor needs. Pastors carry a huge administrative load and often are ill equipped to manage it. This book will assist any pastor in every size church with the insights needed to succeed.

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Often a taboo subject, fraud runs rampant in the Body of Christ. This must change, and this book can and will help! **Confessions of a Church Felon** is a must read for every church leader. This book will help stem the tidal wave of destruction caused by fraud.

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Everyone has conflict. We can be defeated by it or grow as a result of it, but we will not be above to avoid it. The Kingdom of God is relational, and every relationship sooner than later will hit storms. The insights in **Navigating Conflict** will help you learn how to walk through conflict to a redemptive solution.

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## Course Objectives

To train and equip participants in a manner that will enable them to return to their respective organizations with enough information and expertise to effect positive change.

- How to effectively budget through times of static or declining revenue
- How to reduce politics and insert vision into your budgeting process
- How to retain “good staff” in lean times
- How to avoid getting lost in the details of the budget process
- How to avoid lengthy and ineffective budget meetings
- How to get the right people involved in the process

# Aligning Kingdom Resources For Effective Ministry



## The Problem:

Effective alignment of Kingdom resources to release the organization/ministry to reach its God-given potential.

*“One of the least appealing activities for many ministry leaders is creating form and structure within the organization they run. Identifying roles, creating systems that facilitate growth, establishing a viable corporate culture, instituting policies – this is not the stuff that most leaders-pastors live for. However, every great leader we have studied – from corporate CEOs to successful entrepreneurs to note-worthy leaders-pastors – understands that unless he/she designs the structure of their organization appropriately, he/she has hindered the potential of that entity. Developing structure may be a boring or personally taxing venture, but it is one whose benefits justify the investment in the process.”*

- George Barna, “The Habits of Highly Effective Churches”

## The Solution:

Build and maintain a structure that seeks to foster effective alignment of vision, mission, goals and objectives, with appropriate resources



# Course Outline

**You must have Trust and Accountability before you can SOAR!**

- Establishing and maintaining trust
- Creating accountability

## Step 1: Create the Infrastructure

- Establishing your team leader and your team
- Defining benchmarks

## Step 2: Establish Vision/Mission

- Developing the vision/mission
- Clarifying the vision/mission
- Communicating the vision/mission



## Step 3: Create Annual Ministry-Wide Goals and Objectives

- Formulating annual goals and objectives to increase focus

## Step 4: Formulate the Budget

- Aligning Kingdom resources with the mission & goals/objectives

## Step 5: Develop Tactics and Communications

- Recruiting, training and communicating with the people



## Building a Strong Foundation of Trust

### Moving from control to accountability through trust

*“Without trust, you have nothing. Trust is an increasingly rare commodity these days. People have become increasingly suspicious and skeptical. At one time, you could assume that others would trust you until you gave them a reason not to. But today with most people, you must prove your trustworthiness first.”*

*John Maxwell, “Becoming a Person of Influence”*



## Blind Trust

*No controls, checks & balances or accountability; leaders abdicate responsibility for holding others accountable*

- Provides a platform for fraud
- Provides an environment of temptation
- Leaves the door open for Satan to be creative
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Effective Trust

*A healthy level of trust is earned and maintained*

- Fewer meetings are required to accomplish ministry vision
- Members stay informed and are confident in leadership's actions and initiatives
- The organization can initiate progress and move forward in ministry
- There is greater sense of family and love among members
- New members are viewed as a blessing and incorporated into the leadership of the organization
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Lack of Trust

*Little or no trust of leadership, or among members or in staff*

- Regular bickering and arguing at meetings
- Territorialism, everyone attempts to protect their *turf*.
- Few new initiatives approved except those that directly make everyone comfortable
- New members are held at bay when leadership positions become available
- Focus becomes inward, ministry growth deteriorates
- Positive, passionate zeal for ministering to people is seldom seen
- \_\_\_\_\_
- \_\_\_\_\_

# Accountability

Accountability is the \_\_\_\_\_ that joins and holds the blocks of a strong foundation of trust together.

From Merriam-Webster's Collegiate Dictionary, 10<sup>th</sup> edition (paraphrased):

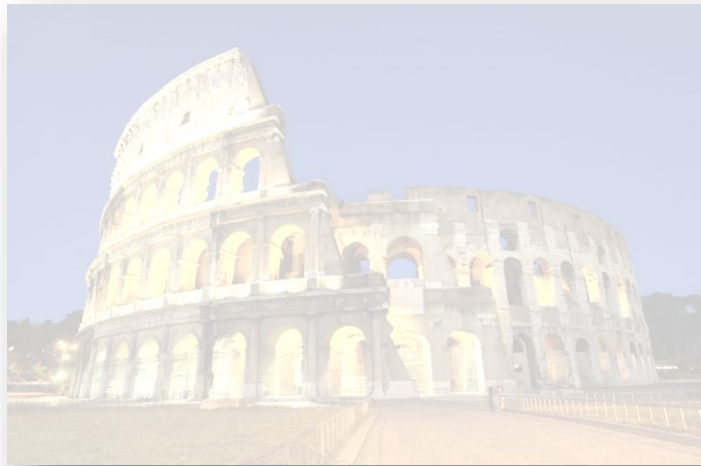
**Control:** *"To exercise restraining or directing influence over, to have power over, to reduce the incidence or severity to innocuous levels."*

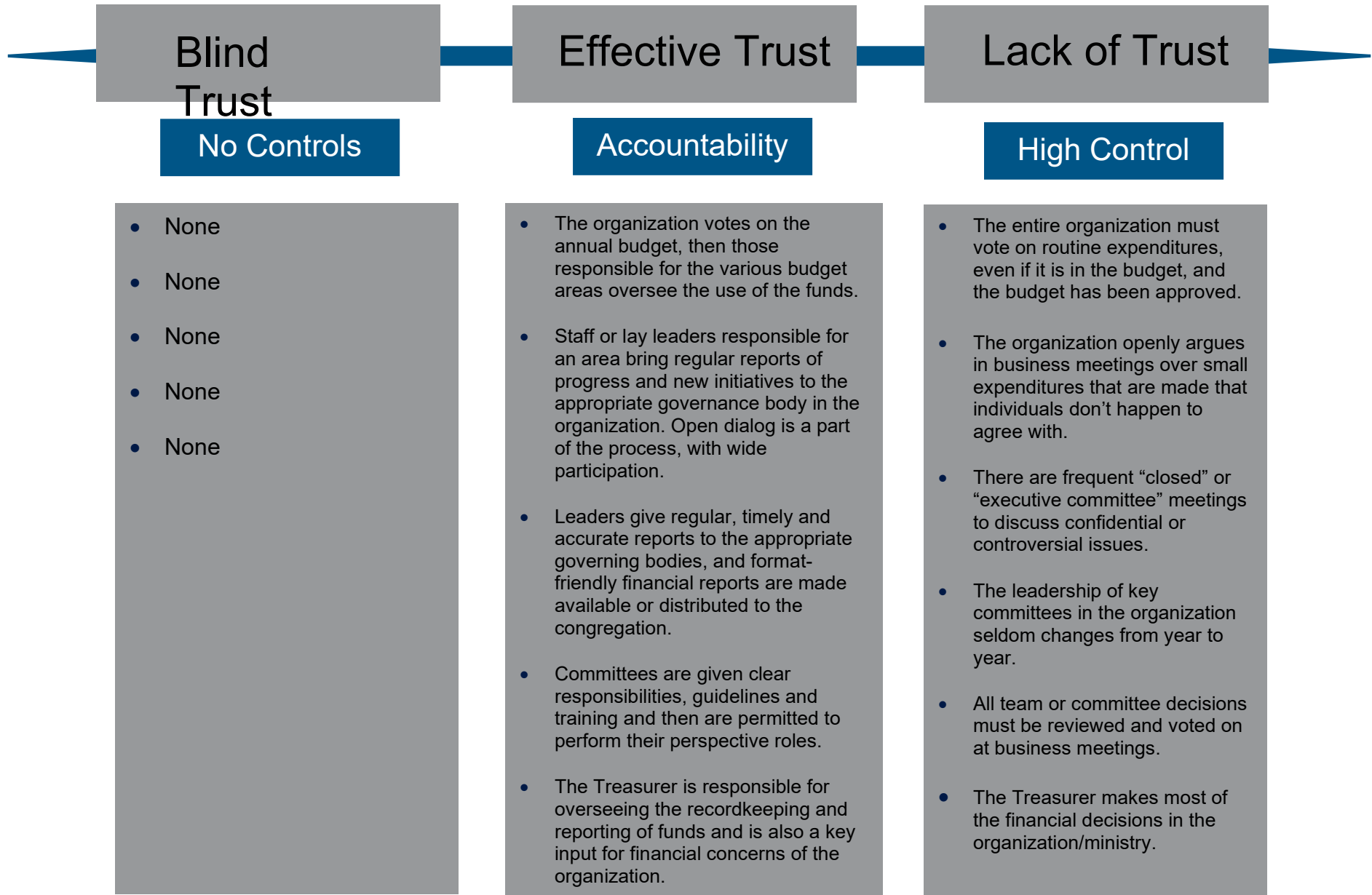
**Accountability:** *"To account for one's actions."*

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*"The ancient Romans had a tradition: whenever one of their engineers constructed an arch, as the capstone was hoisted into place, the engineer assumed accountability for his work in the most profound way possible; he stood under the arch."*

*Michael Armstrong*





# Steps to Building Effective Accountability

## Personally

- ✓ **Follow through on commitments**
  - Do what you say you are going to do.
  - Be on time.
  - Keep a written log of your schedule, use a paper daily planner or an electronic device, keep a list of what you did and did not get done.
  - Check and return phone calls, e-mails and letters in a timely fashion, the same day if possible.
  - At the end of each week, review your tasks and be sure you have completed the things you said you were going to complete.
  
- ✓ **Don't over commit!!**
  - Be realistic. Don't make promises you can't keep.
  - Learn to say no.
  - Expect interruptions and delays, and plan time in your schedule for these.
  
- ✓ **Communicate**
  - Let people know where you are and what your tentative schedule looks like.
  - If you aren't able to keep a commitment, let people know why you weren't able to follow through and when you can follow through.
  - When you make a mistake, admit it, genuinely apologize, and move on.
  
- ✓ **Set goals and boundaries for yourself based on Biblical principles**
  - Share them with others.
  - Ask them to hold you accountable.
  - Stay within them!

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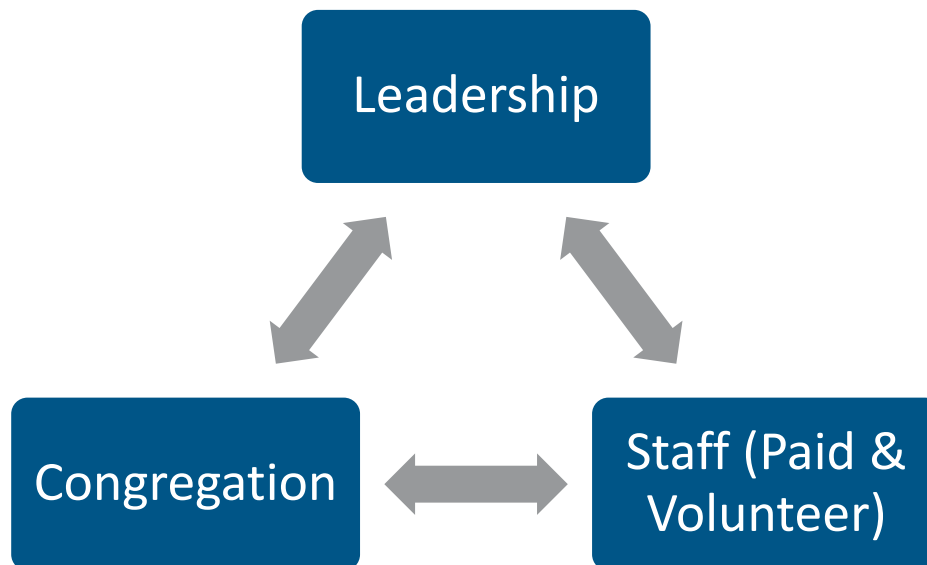
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## Organization/Ministry-Wide

- ✓ **Establish job descriptions for all staff, paid and volunteer. Make certain people understand what is required of them. Job descriptions should include:**
  - Overview of roles and responsibilities
  - Description of specific duties
  - Description of budget authority and oversight
  - Description of expected outcomes, quality and timeliness of work
  - Description of reporting and communications requirements
  - Description of evaluation and measurement criteria
  
- ✓ **Establish team/committee descriptions, they should include the following:**
  - Overview of roles and responsibilities
  - Description of specific duties
  - Description of budget authority and oversight
  - Description of expected outcomes, quality and timeliness of work
  - Description of reporting and communications requirements
  - Description of evaluation and measurement criteria
  
- ✓ **Make meetings effective through accountability**
  - Establish timelines and due dates
  - Recap at the end of each team meeting what was decided and any commitments that need follow-through – by when and by whom
  - Maintain accountability by beginning the following meeting with a report on previous tasks assigned
  - Communicate the above to all persons involved – in writing
  
- ✓ **Maintain financial integrity & transparency**
  
- ✓ **Establish a communications system for:**
  - Congregation to staff
  - Staff (*paid and volunteer*) to leadership
  - Leadership to congregation





To be effective, communications must be regular, appropriate, trustworthy, well-written, and timely.

Good communications can significantly reduce negative perceptions and downward spiraling of vain imaginations.

**Communications Reminder:**

It takes time and effort to become more effective in communications. However, consider how much time and energy it takes fending off misperceptions and bad information!

## Traditional Budget Models

### **“Nada” – No Budget**

#### *Advantages –*

- Simple. No time investment, no accountability.
- Just spend money as it comes in.

#### *Disadvantages –*

- Lacks a plan to measure results. Lacking in accountability and credibility.
- Does not focus resources toward meeting the vision of the organization/ministry.

### **“LYPI” – Last Year Plus Inflation (organization/ministry is stable or growing)**

#### *Advantages –*

- Low key, doesn't require a lot of thought, less political, less arguing, simple, quick and easy.

#### *Disadvantages –*

- Lacks leadership, does not address the changing needs of the ministry, does not strategically seek to enhance the vision/mission/goals and objectives of the organization/ ministry, and does not address dying or dead branches of ministry, allowing them to continue indefinitely.





**“ETAEC” – Everyone Takes an Equal Cut** (organization/ministry is in decline)

*Advantages –*

- Low key, doesn't require a lot of thought, less political, less arguing, simple, quick and easy.
- Touts of being “fair” to everyone and treating everyone equally. As if “equally” = “fair”.



*Disadvantages –*

- Lacks leadership, does not address the changing needs of the ministry, does not strategically seek to enhance the vision/mission/goals and objectives of the organization/ministry, and does not address dying or dead branches of ministry, allowing them to continue indefinitely.
- It also does not reward those who have been good stewards, nor does it bring correction to those who have been poor stewards.

**“WYASLYP” – What You Actually Spend Last Year Plus** an increase or decrease based on the organization/ministry's financial status.

*Advantages –*

- Easy, simple, less time consuming than other approaches, and is based on actual expenditures, the only real manner to judge “real” needs.

*Disadvantages –*

- Lacks leadership, does not address the changing needs of the ministry, does not strategically seek to enhance the vision/mission/goals and objectives of the organization/ministry, and does not address dying or dead branches of ministry, allowing them to continue indefinitely.
- It also does not reward those who have been good stewards, nor does it bring correction to those who have been poor stewards.

## SOAR Budget Model

***“For where your treasure is, there your heart will be also.”***  
**Matthew 6:21**

It is an undeniable fact that where we place our time and money is a direct reflection of where our heart is. While this may cause some to disagree, simply check your personal day timer and your checkbook, and see if it does not clearly define what you value the most!

Organization/ministries are no different. We make claims to be about this or that, but what does our budget and programs tell us? If we say our organization/ministry is about evangelism, and the annual budget for evangelism is \$100.00 and we hear one sermon a year on witnessing, it appears we are not being totally honest with ourselves.

But how do we wrestle this difficult, sometimes political, territorial process of budgeting into a process of aligning and mobilizing financial resources to meet the vision, mission, goals and objectives of the organization/ministry?

### Overview

- ✓ **Establish Trust & Accountability** – Must be the foundation of all inter-workings of the organization/ministry.
- ✓ **Create the Infrastructure** – Find the right leader, build the team, and establish the timeline.
- ✓ **Establish Vision/Mission** – Must give us our blueprint for the future.
- ✓ **Create Annual Goals & Objectives** – Will provide the necessary keys to effective resource allocation (resources are defined as: buildings, staff, volunteers, and oh, money).
- ✓ **Formulate the Budget** – With these prior steps in place, we are then ready to tackle the financial end of the budget process.
- ✓ **Develop Tactics & Communication** – Will give us the people and communication planning necessary to become more effective.

# SOAR: Strategic Organizational Alignment of Resources

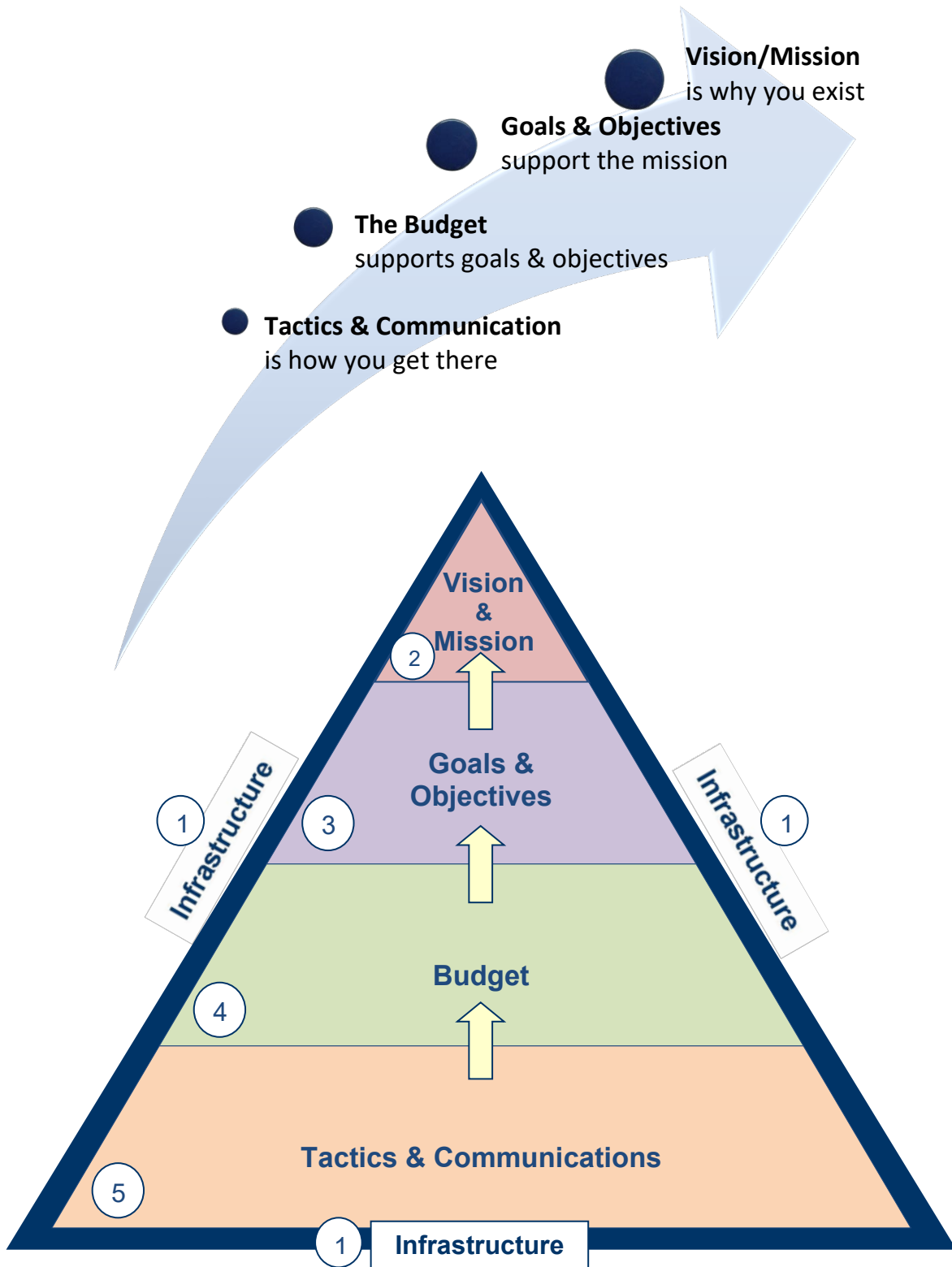
## Advantages –

- The entire process focuses on strategically aligning resources with the vision of the organization/ministry. It further focuses and allocates resources based on needs related to meeting the specific goals and objectives which are in direct support of the vision of the organization/ministry. It can be less political in that the focus is on vision, not individuals or territories.
- It annually adapts to the changing needs of the ministry. It is flexible and growth oriented. It can also measure the effectiveness of those requesting budget funds in that they will be held accountable for meeting the goals they purport with the funds they have requested. Accountability through alignment.

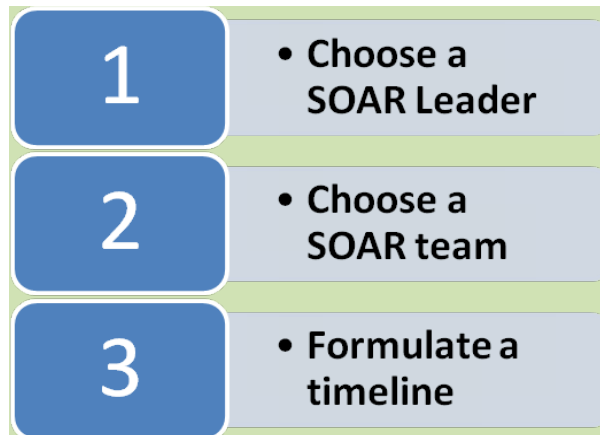
## Disadvantages –

- It takes more time than any other model. It forces people to examine their respective goals and budgets and can damage egos in the process.
- It takes training and trial and error, which most folks don't appreciate. It requires a high level of communication, teamwork, and sacrifice. It's hard, and people would rather take an easier route.





## Step 1 – Create the Infrastructure to SOAR



### 1. Choose a SOAR team leader

An effective team leader is essential for this system to work properly. This person should have good rapport and respect from congregation and staff members alike. They can be a staff person or a lay leader. The person should be an objective, critical thinker with good people skills. They should be creative, open-minded and a problem solver. They must have expertise and experience in facilitating teams and meetings. A detailed job description, including qualifications and expectations should be developed and communicated to the team leader.



Once a leader has been chosen/recruited/appointed, then we must gather together the right team.

### 2. Choose the right team members

First, begin with writing a team member description – a job or ministry description. It should include reporting responsibilities, specific expectations, duties, roles, time commitments, and success and evaluation criteria.

Second, include team members from all walks of congregational life, old and young, male and female, long term members and new members and so forth. You want as diverse a group as is possible. However, don't take diversity to a point of mediocrity, recruit qualified, godly servant leaders.

Look for people who:

- Care about the church
- Are open minded
- Who get along well with others
- Are good communicators
- Are able to influence others
- And most importantly, those who can serve with Godly character



The S.O.A.R. team can and should include pastors, directors, team leaders and ministry heads along with any other folks who have budget authority. It is essential that those who will walk out the vision be present during the formulation of this process.

Obviously, many positions are already filled before this process begins, but to the extent that some positions are open, balance is the key to selecting members.

Remember, you want to recruit folks from all ages, genders, and ethnic groups that are represented in the congregation. This is not about political correctness, but to obtain a true diversity of perspective and diversity of ideas and inputs. Obviously, it is also critical to membership buy-in.

### 3. Formulate a timeline for success - Benchmarks

The **S.O.A.R.** team leader, along with two or three other senior leaders, should formulate a timeline for the entire process. The timeline should include several key benchmarks to help keep the team on track and to ensure timely success.

At least one full session should be devoted to the team's mission and process for working through the SOAR budget system.

- a) Expectations of the processes should be established. A team covenant should be developed articulating how the team will work together, treat each other and assist each other in their mutual success.
- b) Choose someone to be the recorder of all that happens. Note taking is essential to keep the team on track. Meeting notes should be distributed within 48 hours of each meeting to all team members.
- c) Distribute and review the SOAR budget system, answer questions.
- d) Create a general timeline and corresponding deadlines.
- e) Agree on the best regular meeting time and place, assign snacks, assign devotions, and make sure everyone knows when the next meeting happens.

**Special meeting notes:** Be certain to pick a time and place that's conducive to the process. Late night meetings after organization/ministry meetings in the fellowship hall tend to be ineffective because people are tired after a busy day. Try to pick an off night or Saturday morning. Pick a comfortable place, preferably not at the organization/ministry, to break any paradigms. Also provide appropriate refreshments, rotating the responsibilities to various team members. Make meetings a fun process. Begin with prayer, and have someone different each time bring a 2-3 minute devotional. Have some fun!



(Where not to meet)

## Benchmark One – Team Formation/Timeline



- Establish the team and team leader, based on the tips above.
- Communicate clearly the expectations for each team member and for the group, based on the tips above. A sample ministry description is provided in this section.
- Develop and distribute a timeline with benchmarks for each step. Include in your timeline who will be responsible for completing each task and deadlines for each. Review the timeline during each meeting, providing status updates on each task.

## Benchmark Two – Vision/Mission

The ministry must have a vision/mission statement. It needs to be short! One sentence if possible. It needs to communicate why the ministry exists.

Avoid placing goals, objectives, tactics, and values in this statement; those will come later. Make sure that the current vision/mission statement is succinct, and compelling.



It should motivate community members to visit, and inspire existing members on to good deeds.....

If you don't have one, formulate one. For more details, see step 2 and the examples that follow step 2.

## Benchmark Three – Goals & Objectives

Make certain the ministry-wide goals and objectives are in place before using the S.O.A.R. model at the department level.

The ministry should have 3-5 “large rock” goals it wants to see happen in the coming year. Departments will then have a focus point to help them establish their respective goals.

## Benchmark Four – Ministry Departments Engage in the SOAR Model

For more details, see step 4 and the sample worksheets that follow step 4.

Ministry areas, teams or departments establish their goals, objectives, tactics, and communications plan along with a cost estimate for reaching their objectives.

## Benchmark Five – Tactics & Communications

Make certain you have timetables, recruited and trained participants, and a solid communications plan in place before starting the model.



## Sample Ministry Description

### DIRECTOR OF FINANCIAL SERVICES

**POSITION STATUS:** Full time

**EMPLOYEE CLASSIFICATION:** Exempt

**REGULAR WORK HOURS:** Monday-Friday 8:00 am – 4:30 pm + 1 hour lunch

**ACCOUNTABLE TO:** Chief Operating Officer

**ACCOUNTABLE FOR:** Providing effective management of campus-wide financial reporting and controlling systems.

#### **POSITION OVERVIEW:**

The Director of Financial Services is responsible for all facets of planning, leading and organizing the effective management of campus wide financial resources.

#### **OVERVIEW OF RESPONSIBILITIES:**

- 1) Recruit, train, lead, manage and supervise accounting, personnel, and mailroom staff to effective levels of work production.
- 2) Establish and maintain a solid, accountable financial management system that includes:
  - Timely and accurate monthly financial statements
  - Written policies and procedures that will pass audit scrutiny
  - Accurate and timely payment of all bills
  - Accurate and timely processing of payroll, payroll taxes, and corresponding benefits administration
  - Accurate and timely responses to requests from various constituents
  - Separation of duties to insure and protect against fraud or miss-use of funds
- 3) Perform month end close procedures in an accurate and timely manner including:
  - Bank reconciliations
  - Investment reconciliations
  - Accounts payable reconciliation
  - Accounts receivables reconciliation
  - Revenue reconciliation with Institutional Advancement
  - Adjusting and posting correction entries
  - Production of cost center and trustee reports
- 4) Work with banking and other investment agencies to manage all seminary funds in accordance to seminary investment policies while insuring an acceptable rate of return.

- 5) Monitor and manage student accounts receivable in a timely and effective manner. This includes timely statements being sent out and proper follow up and collection of past due accounts.
- 6) Prepare for and manage the annual audit process to a successful and timely outcome.
- 7) Work with COO in annual budget planning process.
- 8) Other duties as assigned.

***BUDGET AUTHORITY:***

Budget authority is limited to the cost center budget. Monthly reporting and accountability for cost center management is required.

***EVALUATION:***

Evaluation will be on an ongoing basis in weekly dialog. A more formal written evaluation will be completed once each year. Performance will be based on degree and quality of completing the job description plus any additional goals agreed upon at the beginning of the evaluation year. Compensation adjustments will be based on quality and quantity of work performed and overall value that the individual brings to the organization.

***BENEFITS AND COMPENSATION PACKAGE:***

Benefits and compensation package will be detailed in your employment letter.

***CONDUCT:***

It is understood that every employee will make a good faith effort to conduct themselves in a friendly and professional manner at all times. Biblical standards are the overarching guidelines we will adhere to both on the job and in one's personal life.

## Step 2 – Establish Vision & Mission

***“Where there is no vision, the people perish.”***

***Prov. 29:18 (KJV)***

One commentator wrote that the true meaning of these words is *“Without a vision, the people cast off restraint, resulting in confusion, disorder, rebellion, uncontrolled license and at worst, anarchy.”*

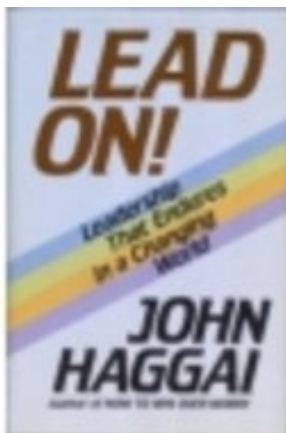
*Haggai (12)*



When building any structure, a blueprint is necessary for several reasons.

- 1) People need to know before you start what it is you are attempting to build. They need an oral, visual and/or conceptual rendering in their mind or they won't be able to help effectively.
- 2) Those who will be working with you to build the structure need to know the details of how tall, deep, and wide the structure is intended to be. Without a blueprint, or in this case a vision/mission, it is difficult to garner the necessary resources to complete the project effectively.

In his book “Lead On”, John Haggai tells us to:



“First, understand what vision is...

Then understand where a vision comes from...

Then understand why a vision is important...

Then understand who must grasp the vision...

Then understand what to do with the vision...”

## Understand What the Vision Is

Haggai states, “A vision is a clear picture of what the leader sees his group being or doing.”

Without a clear vision, how can we ask others to join us or get motivated to assist us in reaching our vision?

Haggai goes on to write:

*“The leader cherishes the vision. They think about it by day and dreams of it by night. They transfer the vision to the group. They then motivate the group to commit to the mission that will realize the vision and meet their real needs.*

*Continuously thinking about the vision induces action. It sounds the death knell to complacency. As the psalmist said, ‘My heart was hot within me; while I was musing, the fire burned.’” (Psalm 39:3) We need to understand that God is the source of the vision of our organization/ ministry.*

## Understand Where a Vision Comes From

While exact methods vary from organization/ministry to organization/ministry, finding and discerning the vision is usually a long-term (3-12 months) process that includes:

***“Every worthy vision comes from God, whether it details with so-called ‘spiritual’ matters or not...” Haggai, 14***

God may choose to use us to lead and/or communicate that vision, but it must be God’s vision. Too often our own vain imaginations and personal desires cloud the skies above us and hinder us from seeing God’s heavenly vision.

- Extensive individual prayer and quiet time for leader or leaders
- Regular corporate prayer time
- Broad spectrum of leadership and congregational input
- A self-examination process by which the organization/ministry comes to grips with the resources God has blessed them with, and what God has not blessed them with.

## Understand Why a Vision is So Important

At that point, a vision is discerned from all of the above compiled together.

Here Haggai writes, *“Vision underlies and underpins all leadership. Without a vision, there will not be an adequate mission. Without a mission, there is no possibility of a productive goals program.”* Haggai, 16

In building terms, the vision is the plumb line that we build from. It is the blueprint, or the benchmark from which we measure our mission, goals, and objectives. Without a proper benchmark, we are very likely to build a structure that is out of square, crooked, and unstable.

The clearer the vision, the more likely people will invest their heart, time, and financial resources in fulfilling that vision.

*A sample worksheet is available at the end of this section*

## Understand Who Must Grasp the Vision



Haggai continues by stating: *“Both the leader and the followers must grasp the vision. Leadership starts with a vision on the part of the leader, but for the followers to give credence to the leader’s direction, they must understand the vision too. A major responsibility of the leader, therefore, is to accurately communicate his vision to his group.”* Haggai, 17

Knowing and being personally convinced of the vision is not enough! **Leadership knowing and believing is not enough.** Everyone that is to be a part of fulfilling the vision must clearly understand it. That is no small or easy task.

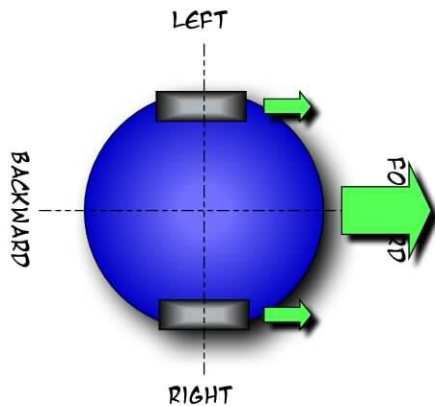
Communicating the vision can be an exercise in frustration. While 10% of your members will get it the first time you proclaim it, a corresponding 10% will never get it, regardless of the communication tools you use. This leaves us with the need to focus our communications energies on the remaining 80%.

## The keys to communicating the vision include the following:

- Say it early and say it often.
- Create the vision in an easy to remember format.
- Adjust the verbiage as necessary for clarification and impact.
- Use as many forms of media as possible: written, video, spoken, posters, banners, bulletin boards, testimonies, pins, coffee mugs, pens, etc.
- Use creative redundancy. (*saying the same thing again only in a different manner*)

Here Haggai addresses the final step:

## Understand What to Do With the Vision



While developing or clarifying a vision and then communicating it is sufficiently challenging for most, it is not enough.

We must move the vision to mission and the mission to goals.

Vision/Mission and Core Values Worksheets and samples are listed on the following pages.

*“You understand what a vision is, where a vision comes from, why a vision is important to a leader, and who it is that must grasp a vision. What do you do with a vision? The obvious answer is you commit to act on the vision (that commitment is called a mission), then design a goals program to achieve the mission, and thus fulfill the vision. That commitment includes a determination to overcome difficulties and eliminate obstacles.”*

Haggai, 19

## Sample Vision/Mission Worksheet

This process can be done individually to stimulate thinking, organization/ministry-wide or as a small group process. In a small group process, we strongly recommend that a trained facilitator be used. Wall charting is very beneficial to the process and we further recommend that brain storming and/or brain mapping be used.

**Vision** = What is the God-given reason this organization/ministry exists?

It should be a short, impacting, powerful statement that will encourage and remind current members of their heritage and inspire new members to join the vision.

**Mission** = The vision in motion.

They are action oriented bullet points. They seek to walk out the vision in a tangible manner. It tends to address the statement: We will endeavor to pursue our vision through: ..... The bullet points should be limited in number and realistic in nature.

They are **NOT** goals and objectives, they are categorical in nature.

## Vision Questions

1) Describe what fruits of the spirit that are most prevalent in our congregation today? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) What single words would you use to describe the prevailing character qualities of the congregation? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) Historically, what areas of ministry has the organization/ministry been gifted in? Where has the organization/ministry excelled in ministry? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Mission Statement

4) Historically, what ministry area(s) has the organization/ministry not done well?

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5) What are the current ministry needs of the members of the congregation?

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6) What are the current ministry needs of the surrounding community?

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7) Given the current profile of organization/ministry members, the spiritual gifts currently present, the strengths and weaknesses of the organization/ministry historically, the current ministry needs of the congregation and the surrounding community, write one sentence stating what this organization/ministry should be about, what is the God-given purpose of this organization/ministry, why does this organization/ministry exist?

***(Vision Statement)***

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As mentioned earlier, the mission is the vision in action. It is a series of statements describing what actions, categorically, the organization/ministry will take to walk out its vision. Keep them brief, and do not include any specific goals, objectives, tactics, or communications strategies.



## Values

Answer the question:

“We will endeavor to walk out our God-given vision by: . . .”

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

In addition to a strong, compelling vision statement, and succinct mission statements, some organization/ministries have found it helpful to include a statement of core values.

They help to clarify and identify the overarching core values that will be used in the pursuit of the vision/mission. They often include what the organization/ministry will do and how it will conduct its actions, and what the organization/ministry will not do in that process.

Core values are usually a listing of brief and well-written statements answering the question:

During our journey of pursuing our vision and mission together, we will aspire to remember to:

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

***Note: See sample of vision, mission, & values on next page***

Sample

## FELLOWSHIP CHURCH

### VISION STATEMENT:

*“Fellowship Church exists to celebrate the presence of the living God”*

### MISSION STATEMENT:

*“Our mission is to celebrate the presence of the living God by:*

***Gathering** people from all walks of life into a caring  
Christian community,*

***Equipping** people with a practical faith that impacts their daily lives,*

***Sending** people to serve Christ in our community and  
around the world”*

### CORE VALUES:

*“As we labor together to accomplish the God given vision and mission  
of this organization/ministry, we will endeavor to:*

*Bring glory and honor to God in all that we do and say*

*Exercise Hospitality to all of God’s people*

*Seek to support social justice for all*

*Serve our community with love and compassion*

*Practice good stewardship individually and corporately*

*Continually pursue knowledge and truth”*

## Step 3 – Create Ministry-Wide Annual Goals &

Once the foundation of trust and accountability has been poured and has had a chance to “set up” and after the vision/mission has been blueprinted and clearly communicated, then it is time to begin the “rough-in” or “framing” portion of the project referred to as annual goals and objectives.

Just because you have good, successful business leaders or seminary trained staff on your committees, don’t assume they have the training or skill set necessary to formulate effective goals and objectives. Be prepared to



### Who to Include

- Senior leader (of course!)
- SOAR leader
- The ministry leaders who will be held accountable for achieving the goals and objectives developed
- Trusted lay leaders who have a “big picture” perspective AND good spiritual discernment
- Appointed note taker

*Include enough people to gain a variety of inputs and perspectives, but not so many people that it creates chaos. The size of the group will also depend on if you are discussing short-term goals (6-12 months) or long-term goals (1-3 years).*

### Timeframes



General framework:

- **Long-Range Goals** – (3-7 years)
- **Intermediate Goals** – (1-3 years)
- **Near-Term Goals** – (6-12 months) or the coming year

## Long Range Goals (3 -7 years)

Long Range Goals are good for folks that are compelled to dream deep into the future. They also help provide a sense of long-term direction for the ministry. These goals might include:



- Future ministry expansion
- New programs
- New facilities
- New location

## Intermediate Term Goals (1 -3 years)

Likely participants: All key leaders of the organization/ministry

- Limit to 12-15 people (maximum) for effectiveness
- The process, if done correctly, would only need to be done in its entirety once every 3 or so years. The plan and its progress should be reviewed each year.
- They set the over-arching, primary goals impacting the entire organization/ministry, and all long-term goals **MUST** support the Vision/Mission.
- ***Keep this group on task, do NOT allow them to work with goals, objectives, tactics or communications.***

## Near-Term Goals (6-12 months) or the coming year

- Likely participants include: Volunteers, Paid staff, Deacons, Trustees, Committees, Teams, Ministry departments
- Process would be completed annually
- This piece of the process can be done in small groups, but all short-term goals must support long-term goals

The departmental or ministry leaders are normally responsible for generating, managing and implementing short term goals; therefore, they must participate in the goal setting process.

## Developing *Effective Goals & Objectives*



- **Specific:** Goals should be clear and understandable by those who are charged with the responsibilities of carrying them out. (This usually means that they are in written form.)
- **Measurable:** When met, those involved should easily know and understand they have achieved success.
- **Attainable:** Goals should be realistically within the reach of those who are attempting to reach them.
- **Relevant:** Ensure that ALL goals support the Vision/Mission of the ministry.
- **Time-Bound:** Effective goals have realistic and specific time-tables attached to them.

### Don't Forget!

When goals are reached, they should be communicated and celebrated appropriately!

- To affirm/appreciate those who worked to achieve them
- To set up future goals for success

The goal setting process is just that, a process. It will not work perfectly the first time it is implemented. However, over several years of training, implementing and refining, the system can produce some amazing results.

## Step 4 – Formulate the Budget

Trust and Accountability have been built.

Infrastructure has been created.

Vision/Mission has been established.

Annual Ministry-Wide Goals & Objectives have been created.

Now you can **effectively** formulate the budget!



### 1. Ministry Team/Department Work

#### Who?

- Each department, committee or ministry that is a part of the vision of the organization/ministry

#### What/How?

- Pray. Pray about how God might affect the lives of te you are trying to reach or minister to, and how God wants to use this ministry team to accomplish His objectives.
- Develop Ministry Team Objectives. Leaders should meet with their department/committee or ministry (ministry team) to develop a ministry plan – what that ministry will seek to accomplish in the coming year.

That meeting should begin with a recap of the Organization’s Vision/Mission, and then a review of the Annual Ministry-Wide Goals and Objectives already established. Then specific, ministry team objectives can be created.

Ministry Team Objectives should be short-term, departmental goals that are directly tied to the overarching Ministry-Wide Goals and Objectives that have been set. Each objective they set should be directly linked to meeting a specific long-term goal of the organization or ministry. If not, it needs to be reviewed and re-evaluated.

- Determine Resources Needed. Once the specific objectives are established and agreed upon by the ministry team, the Ministry Team should determine the resources needed for each objective, mapping out the cost of implementing those objectives (see samples in this section).

- Submit a Budget Packet to the SOAR Leader, explaining the Ministry Team’s goals and objectives, how they help the vision of the organization/ministry and fit within the Ministry-Wide Goals and Objectives, and listing resources needed (see sample budget worksheet in this section).

## Tips for Ministry Team/Department Work

- Give the department a timeline, specific tasks, and expected outcomes they must achieve.

Provide a timeline. Example:

June 1	The Leadership Team meets to review Vision/Mission and establish Annual Ministry-Wide Goals and Objectives
June 15	Annual Ministry-Wide Goals and Objectives are distributed to Ministry Team Leaders/Departments and communicated to the congregation
July 1	Ministry Team Leaders/Departments receive budget packets from SOAR leader
July 1 – Aug 31	Ministry Team Leaders/Departments meet to determine their Ministry Team objectives for the coming year.
Aug 15 – Sept 15	A subset of the SOAR team projects income for the coming year.
Aug 31	Ministry Team Leaders/Departments submit budget packets to SOAR leadership team with verbal presentation of objectives.
Sept 15	SOAR leader and appointed SOAR team meet to discuss budget packets – the objectives for each ministry team, how those fit into the Annual Ministry-Wide Goals and Objectives, and the resources needed. The team adjusts ministry team/department objectives based solely on achieving the Annual Ministry-Wide Goals and Objectives at this point. No dollars are discussed.
Oct 1-31	SOAR leader and appointed SOAR team meet. The SOAR leader brings a ministry-wide document he/she has developed, listing the objectives for each team, along with the dollars associated with each. The resources needed are compared with projections for income, and adjustments are made.
Nov 15	The SOAR budget is presented to the ministry’s Board or governing body for approval.
Dec 1	The SOAR budget is presented to the congregation for approval and becomes final.

- Provide specific instructions - example:
  - ✓ They are charged with the responsibility of formulating a list of not more than 10 goals and objectives for the coming year. Those goals must tie to the ministry wide vision/mission and support ministry wide goals.
  - ✓ They should include: \_\_\_\_\_participants, parents, students, ministry-wide leadership, etc.
  - ✓ At the conclusion of their work, they will submit a list of goals and objectives to the leadership team for further evaluation and consideration.
- Provide a form or worksheet for them to submit. It gives each ministry team/department a structure to work within, helps achieve the outcome you desire, and helps maintain consistency among the various teams/departments. See examples listed at the end of this section.
- Be sure to train a facilitator on how to work with volunteers and other leaders. In addition, we strongly recommend the use of our “Keys to Effective Team Meetings” located at the end of this section.

## 1. Determine Available Resources/Project Income

While the departments are working on their goals, objectives and funding requests, a subset of the SOAR team should be formulating projected financial resources available.

### Things to Keep in Mind:

- Use a combination of 3–5-year trends, with current data having the heaviest weight
- Take into consideration current circumstances at the ministry at this time, projecting any anticipated changes the coming year
- Add serious prayer time and faith to the mix!



## 2. The Review Process

When all departments have completed their budget packets, made their presentations to the SOAR team, and had a time of Q&A and review, then the SOAR team compiles the results. Be sure to set realistic time frames and deadlines for completion.

Assuming that budget requests will always exceed the available funds, ☺ the trimming process can be handled in a couple of different ways:

- a. If the SOAR team desires, they can approve an overall dollar amount for that area, based on the information submitted, and they can then leave it up to that area to go back and reevaluate which of their specific goals will be funded for that year. We do not recommend this option.
- b. The SOAR team could decide on the merits of the specific goals and objectives and approve or disapprove as needed to balance the budget. We strongly recommend this option.

While both options have merits, perhaps even a combination approach could be used.



We strongly recommend keeping the process a goal driven or goal directed process. Decide on the merits of the goals, not the dollar amounts.

***Remember: While cutting everyone by an equal percent is passive and politically safe, it de-motivates good ministries and perpetuates ineffective ones!***

### 3. Presenting the Final Budget

The final budget is then assembled, and submitted to the organization/ministry for final approval.

It is very important when presenting the budget for approval, that the vision/mission, ministry-wide goals and objectives, and even larger department goals are presented first, then the resources it will take to meet the vision/mission, goals and objectives.

Depending on the nature of what is contained in the budget, *i.e. capital needs, new staff members, new ministry programs or new construction etc*, it might be desirable to break down the budget into sections for the congregation to get behind financially. Examples are listed on the next pages.

#### Sample Organization/Ministry 20XX Basic Ministry Budget

**Ongoing Mission/Vision:** “ \_\_\_\_\_ ”

#### Ministry-Wide Goals and Objectives Highlights

- ✓ Reach out to “X” of new people in our community for Christ
- ✓ Serve “x” number of meals or lodging
- ✓ See our youth group grow by 25%
- ✓ See our children’s ministry \_\_\_\_\_
- ✓ Start “X” new ministry to serve \_\_\_\_\_

#### Budget specifics include:

- ✓ Includes \$ for current staffing of x, y, & z positions with x % raises
- ✓ Includes \$ for x, y, and z ministries operations
- ✓ Includes \$ for global, state and local missions
- ✓ Includes \$ for building, grounds utilities and insurances

## Sample Organization/Ministry 20XX Challenge Budget

If and/or when the basic operating budget is met, we would then like to begin work on the following challenge budget initiatives:

### Challenge Budget Initiatives

- ✓ New roof on education wing
- ✓ Remodel Youth room in basement of sanctuary
- ✓ Purchase a bus for a new bus ministry
- ✓ Youth missions trip to Mexico
- ✓ Etc.

It should be noted that this process should **NOT** be confused with special fund raising or the solicitation of designated gifts for these areas. Diverting funds to pet projects tends to be counterproductive. These projects come only after the basic budget needs are being met consistently.

**Accountability/Monitoring:** The process is then monitored throughout the year and individuals, committees, teams and ministry areas are held accountable for the goals they have published and the funds they have spent.

This can and should play an important role in budgeting for the following year as well as reviewing staff and lay leader performance.

Do not be afraid to build in accountabilities and benchmarks into your annual process. Churches, schools and ministries of all types are reluctant “judge” performance of individuals, departments or entire organizations.

This planning process allows you to measure and monitor what was requested and what was accomplished for consideration in the following year’s process.

**Sample A – Ministry Department Goals & Objectives**

**Ministry Area:** \_\_\_\_\_

**Point Person:** \_\_\_\_\_ **Date:** \_\_\_\_\_

1) What is the mission of your ministry area?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) How does that mission specifically assist the organization/ministry in meeting its vision/mission?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) What are the specific goals for the coming year, and how do they specifically help you meet your mission?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4) What (or who) are the specific tactics you will employ to help reach your stated goals? Please address each goal separately.

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5) What is the general communications plan you will use? *i.e. how often will you meet, with whom, how will you stay in touch with everyone, how often will you provide a report to the appropriate governing body?*

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6) Please provide a detailed listing of the financial resources you believe necessary to meet your goals.

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**Sample A (cont.) – Resources Needed to Meet the Goals**

Description:	Amount Requested:	Amount Approved:
<b>Routine items -</b>		
<b>Total:</b>		

### Sample B – Ministry Team/Department Budget Worksheet

Ministry Team \_\_\_\_\_ Budget Year \_\_\_\_\_

Ministry Leader \_\_\_\_\_ Date \_\_\_\_\_

**Ministry Objectives**

Objective	Description of Objective	Ministry-Wide Vision/Mission and/or G&O It Supports	Resources Needed		
			People	Equip/Supplies (no \$\$ needed)	Money
1.					
2.					
3.					
4.					
5.					
6.					

**Financial Resources Needed for Budget**

Objective	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1.													\$
2.													\$
3.													\$
4.													\$
5.													\$
6.													\$
Totals													\$

### Sample C – Individual Project Organizer

**Project/Objective name:** \_\_\_\_\_

**Brief Description:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Anticipated start date:** \_\_\_\_\_

**Anticipated completion date:** \_\_\_\_\_

**Person(s) responsible:** \_\_\_\_\_

**Regular progress reports to:** \_\_\_\_\_

**How often:** \_\_\_\_\_

**Resources Needed:**

**People:** \_\_\_\_\_

\_\_\_\_\_

**Materials:** \_\_\_\_\_

\_\_\_\_\_

**Dollars:** \_\_\_\_\_

\_\_\_\_\_

**Other:** \_\_\_\_\_

\_\_\_\_\_

***Accountability: we are successful when...***

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



### Step 5 – Develop Tactics & Communications

⇒ Recruiting, training, and communicating with people

**Tactics:** “The art or skill of employing available means to accomplish an end.”

*Merriam-Webster’s Collegiate Dictionary, 10<sup>th</sup> Edition*



## 1) COMMUNICATIONS PLAN

A well-formulated, well executed communications plan will go a long way in increasing the chances for meeting the objectives.

When developing your communication, consider the following:

- ⇒ **When** each step of the SOAR process will be completed (see example on page 39)
- ⇒ **Who** should be informed - Pastor, Board, Finance Team, SOAR Team, Ministry Team/Department Leaders, Members, Congregation/Constituents - for each step
- ⇒ **Timing** of that communication – give people enough time to pray and to respond
- ⇒ **What** should be communicated – expectations of each person involved, meeting dates/times, follow-up tasks and decisions made after each meeting

### Creative redundancy

Use various types of communication to say the same thing again but in a different way:

- Face-to-face meetings
- Phone conversations
- E-mail
- US Mail
- Bulletin announcements / boards



- Use whatever works best, just be consistent and timely!
- Don't be afraid to analyze your communications effectiveness and adjust your style
- Don't be afraid to be creatively redundant; use a mixture

**REMEMBER: YOU ARE NOT COMMUNICATING FOR YOU,  
YOU ARE COMMUNICATING FOR THEM!**

## KEYS TO EFFECTIVE TEAM COMMUNICATIONS/MEETINGS

- ✓ I. Set up Conducive Context:
  - a) Consider the overall environment (*time, place, visual aids, chairs, tables*)
  - b) Give an overview at the beginning
  - c) Give the direction you are headed
  - d) Share expected outcomes
  
- ✓ II. Deliver Content Effectively:
  - a) Give the data
  - b) Illustrate, explain, give examples, and tell the whys
  - c) Reiterate key points
  - d) Ask for questions and/or feedback
  
- ✓ III. Bring Closure:
  - a) Recap key meeting components
  - b) Give specific expectations regarding the future (next steps)
  - c) Smile, make sure they got the points
  - d) Ask for any final questions



## COMMON QUESTIONS:

### Q: What if revenues are declining or static?

**A:** That is not a new problem created with this model nor is it unique to this model. The difference is that this model is completely goal-directed. It forces you to go back and reevaluate vision, goals and objectives and corresponding priorities versus the traditional approach of cutting everyone's budget by x% to make it balance.

***Cutting everyone by an equal percent is passive and politically safe. It demotivates good ministries and perpetuates ineffective ones!***

Establishing priorities and then funding priorities takes leadership and courage.

### Q: How do we keep good staff during difficult times?

**Minimize waste.** Get rid of projects that aren't in line with established goals and objectives. Are there time-consuming tasks on anyone's desks that don't really need to be done anymore? Evaluate tasks that have been done for a long time; maybe there's no longer a need? Are there tasks that could effectively be completed by another staff member with a lower salary or even a volunteer?

**Reevaluate priorities for the team and for each individual.** When staff is spread too thin, it is often because there is no end to the ministries that you can begin and maintain. Evaluate which ministries and tasks are producing the desired results and eliminate or slowly dissolve the others.

**Reevaluate positions.** Are the paid positions currently filled at your ministry the right ones? Are there poor performers or good-hearted employees that are simply in the wrong job in your ministry? Could full-time positions be filled with one or more part-time employees? Are there positions that could be consolidated? Is outsourcing an option for any current positions? Does a change need to be made?

**Treat good employees right.** Set clear expectations so they can be successful. Provide performance reviews so they know when they've hit the mark and how they can adjust in order to continually improve. Find ways to motivate and empower effective staff by adjusting your leadership to each individual employee and situation. There are many books on this subject! Give them tasks and projects within their gifting/skill set. Appreciate them regularly, often, and specifically.

### Q: What if people don't like this model?

**A:** We **guarantee** that some folks will not like this model. Anytime folks are required to annually evaluate their department in light of the current mission and vision of the organization/ ministry, you can be assured they will feel threatened.

There will be resistance to change of any kind, especially when it involves resources.

**Q:** How long will it take before it really works like it's supposed to?



**A:** It usually takes at least two to three years (or budget cycles) before it operates smoothly and becomes a part of the organization/ministry culture. Folks first have to learn the model, accept it, and then practice using it for several years.

After several years of working the model, it can become an embedded part of organization/ministry's culture.

Plan the work and work the plan, stay with the fundamentals and communicate, communicate, communicate.

**Q:** Besides a more purpose-driven budgeting process, are there other benefits to this model?

**A:** Yes!

- 1) It trains people to think more about the organization/ministry and its vision/mission than themselves or their ministry department.
- 2) It promotes regular self-examination and ministry justification, a healthy process that everyone should take part in.
- 3) It trains people to focus on goals instead of individual wants and desires.

***How could we possibly do everything listed in this workbook? It's too much, it's overwhelming!"***

We agree! If you needed to do everything in this workshop by next week, you're right, it would be too much.

Remember, how you eat an elephant?  
***"One bite at a time!"***

We can't emphasize this point enough; this is a long-term process.

Implementation will be slow and difficult at times.

***But when done well, your ministry is positively impacted!***



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## CLOSING COMMENTS

The contents of this workshop and this workbook are a culmination of over 45 years of combined management expertise of the contributing writers working in and with churches and religious organizations. They are also flavored with the thoughts of many of today's most effective researchers and outstanding leaders.

It is our heart's desire that the Kingdom of God will grow and expand as the principles of aligning Kingdom resources with vision, mission, goals and objectives begins to take hold in your church.

It is not an easy or short process. It's a journey, perhaps a long one. But when you consider the alternatives, it appears we must choose to go forward.

“FINALLY, BRETHREN, WHATEVER THINGS ARE TRUE, WHATEVER THINGS ARE NOBLE, WHATEVER THINGS ARE JUST, WHATEVER THINGS ARE PURE, WHATEVER THINGS ARE OF GOOD REPORT, IF THERE IS ANY VIRTUE AND IF THERE IS ANYTHING PRAISEWORTHY, MEDITATE ON THESE THINGS.”

PHILIPPIANS 4:8

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