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Strategic PLan for Parishes

A Governance Code Compliance Reporting Guide (ROI)

# WHAT IS A STRATEGIC PLAN?

The CRA Governance Compliance Code asks parishes to be forward-looking and plan for a sustainable future. Part of this involves a ‘strategic plan’.

A strategic plan is an overview document that links together the Charitable Purpose and the Charitable Objects (both of which are long term statements) with Strategic Objectives. Strategic Objectives generally cover a medium-term period between one and five years. The Strategic Objectives describe how the parish will deliver its charitable purpose. The plan makes clear, but high level, statements about what the parish intends to do.

Strategic Plans can be too idealistic if they are not grounded in reality. To be realistic, the Strategic Plan must be supported by what the CRA calls ‘operational plans’. This just means a sensible plan to make sure there are people, finance and anything else needed to achieve these goals.

A strategic plan may be as simple as expressing a determination to continue to support the provision of public worship and pastoral ministry in a particular place. Or, it may be quite complex, such as running a community project like a lunch club for elderly people.

Below, there is some information that will help you put the building blocks in place for a Strategic Plan for your parish. When you have your plan agreed within the parish, it should be approved by the Select Vestry. A more detailed plan will be needed, with a budget and an action plan to guide the work on the ground.

## STEP 1 - CREATING YOUR STRATEGIC PLAN

## STEP 5 - MANAGE YOUR PLAN FROM START TO FINISH

**STEP 7 - AT THE END OF THE YEAR, RECORD YOUR WORK IN THE GOVERNANCE COMPLIANCE REPORT**

**STEP 6 - INCLUDE YOUR ACTIVITY IN YOUR ANNUAL REPORT & IN THE CRA REPORT**

## STEP 4 - ADD AN OPERATIONAL PLAN

## STEP 3 - LINK YOUR STRATEGIC OBJECTIVES TO YOUR CHARITABLE PURPOSE & OBJECTS

## STEP 2 - IDENTIFY YOUR STRATEGIC OBJECTS

## STEP 1 - CREATING YOUR STRATEGIC PLAN

Summarise your Charitable Purpose and Objects

Charitable Purpose (Summary):

The advancement of the Christian religion in the parish of [NAME]

Charitable Objects (Summary):

1. To raise and allocate sufficient funds to support the provision of public worship by:

* providing for maintenance and insurance of the parish church;
* providing church fittings and the requirements for common worship;
* providing bread and wine for the celebration of holy communion.

1. To raise funds and provide allocation of same to support the provision of pastoral ministry by:

* maintaining and adequately insuring the parish hall, glebe, graveyard, and any other parish property or tangible asset;
* supporting and providing for all aspects of pastoral ministry, mission and charitable work of the parish.

1. To allocate adequate funds and time to ensure proper management and oversight of parish affairs as outlined in the Code of Governance of the CRA and the Constitution of the Church of Ireland and to ensure adequate record keeping.

## STEP 2 - IDENTIFY YOUR STRATEGIC OBJECTS

Some examples:

Repair the Church Roof

Establish a border of pollinating plants in the path from the gate to the Church door.

Invite our community to share an ecumenical service of worship at Christmas.

Establish a lunch club for the elderly people in our village on Thursdays.

## STEP 3 - LINK YOUR STRATEGIC OBJECTIVES TO YOUR CHARITABLE PURPOSE & OBJECTS

Write an explanation of how the strategic object reflects your Christian purpose or one of the charitable ‘object’ statements.

Example – how this action reflects our Christian purpose: As Christ reached out in fellowship to the people he met, we want to offer Christian hospitality and fellowship to the elderly in our community in the hope that their lives will be improved through the Christian values of welcome, fellowship and sharing in the life of our parish.

## STEP 4 - ADD AN OPERATIONAL PLAN

If you have a budget or financial plan, or a list of people who have committed to make this project happen, these can be described as an Operational Plan.

## STEP 5 - MANAGE YOUR PLAN FROM START TO FINISH

When you have a Strategic Objective and Operational Plan, your agenda at Select Vestry meetings should include an item where you hear about the progress that has been made - or the challenges encountered – and in this way, you demonstrate both accountability and transparency and you ensure that if decisions are needed, they are addressed in a timely way. Record discussion and decisions in the Minutes.

## STEP 6 - INCLUDE YOUR ACTIVITY IN YOUR ANNUAL REPORT & IN THE CRA REPORT

At the end of the year, make sure you include your Strategic activity in your annual report.

## STEP 7 - AT THE END OF THE YEAR, RECORD YOUR WORK IN THE GOVERNANCE COMPLIANCE REPORT

Your Minutes will then provide the ‘evidence’ for your entry in the second column of the CRA Compliance Report at the end of the year, to show how actively you managed the work that you had set out.