**DOCTOR Planning Process**

The Following Strategic Plan guide is based on the book *Masterplanning* Bob Biehl. This is based on his DOCTOR planning process which is outlined below.

**D**irection

Why do we exist? What are our objectives? What do we do next?

**O**rganization

Who is responsible for what? For whom? Do we have the right people in the right place?

**C**ash

What is our projected income, expense, net? Can we afford it? How?

**T**racking

Are we on target? How do we improve? What do we cut and continue?

**O**verall Evaluation

Are we achieving the quality we expect and demand from ourselves?

**R**efinement

How can we be more effective and more efficient?

The **Direction** step is broken down into 11 elements to consider: (called planning *Arrow*).

1. Needs
2. Mission and Vision
3. Objectives
4. Milestones
5. Ideas
6. Roadblocks
7. Resources
8. Quarterly Goals
9. Short-Range Goals
10. Mid-Range Goals
11. Long-Range Goals
The Ministry Context

The Area of Ministry

Things to include in your list: social, spiritual, and educational characteristics of the people you are trying to reach. Significant groups of people with their nationality. Significant employers in the area. Places people naturally gather for events. And other characteristics you can think of.
What needs do we feel deeply burdened by and uniquely qualified to meet?

What makes us weep? What needs are aligned with our heart?

What am I uniquely gifted/qualified to do? What are our unique gifts?

**Brainstorming: Focus on growth process**
Purpose statement work/words: (e.g. Connect, grow, serve, go OR Evangelize, equip, export)

**Potential Key Verses**
Why do we exist?

Mission Statement:

Key Areas Expanded in paragraph form:

Values/distinctives:

Vision Statements: (What do we want to see happen?)
Objectives

What areas should we impact?
What specific areas will we work on and set goals for?

Scriptural Basis:

Contexts: Where will this objective be accomplished?

Topics: What topics will this objective need to address?

Tools: What tools will this objective utilize?

People in this Stage: At end of this growth stage, what will be the characteristics of the person?
Objectives

Scriptural Basis:

Contexts: Where will this objective accomplished?

Topics: What topics will this objective need to address?

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Contexts: Where will this objective accomplished?

Topics: What topics will this objective need to address?

Tools: What tools will this objective utilize?

People in this Stage: At end of this growth stage, what will be the characteristics of the person?
Summary of Process

CONNECT

GROW

SERVE

GO

EXAMPLE: Lifeway
How has God blessed us to bring us to this place? What have we already accomplished?

What has not worked? Why? How can we improve?
What ideas do we have that we should consider turning into priorities?

Idea:
What roadblocks may keep us from reaching our full potential?
What are our greatest resources to help us? How can we utilize these?
In the next 90 days, what are the three most important measurable, realistic targets of accomplishment for each objective? Include dates.
Short Range Goals

In the next zero to two years, what are our three most important, measurable, realistic targets of accomplishments for each objective? Include dates.
In the next two to five years, what are our three most important, measurable, realistic targets of accomplishments for each objective? Include dates.
What three measurable, realistic priorities are we dreaming of accomplishing for each objective five to 20 years from now? DREAMS!
Who is responsible for what? Who is responsible for whom? Right people in right places?

Example layout

![Organization Diagram]

**Staff**

- Administration Missions
- Worship Leader
- Outreach Serving
- Men’s Leader Discipleship
- Women’s Leader Discipleship

**Responsible for what**

- Emails, copies, calls, finances
- Help plan events and retreats
- Organize and help lead mission trips
- Teach on missions
- Work with church missions team
- Student mission team
- Students signing up for missions

- Plan and lead weekly worship
- Mentor band members
- Lead worship for special events
- Help with Sunday church worship
- Speaking/teaching

- Organize outreach events
- Mentor students in how to share faith
- Lead the various service teams
- Help plug students into church
- Coordinate service projects

- Lead men’s events
- Mentor men
- Speaking/teaching
- Small group leaders coach
- Help with leadership development

- Lead women’s events
- Mentor women
- Small group leaders coach
- Help with leadership development

**Responsible for whom**

- Worship Band Members and worship night volunteers
- Students on the serving teams

- Men’s ministry leaders
- Men’s small group leaders
- Women’s ministry leaders
- Women’s small group leaders
Who is responsible for what? Who is responsible for whom? Right people in right places?

Your Layout:

Supervisors

Staff

Responsible for what

Responsible for whom
What are our projected income, expenses, and net? Can we afford it? How?

Cash Breakdown—Annual

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**Total**
Tracking Worksheet

Are we on target? How will people report progress?

Name: ___________________________________________ Date: _______________________

- A highlight is; A lowlight is:

- I have made progress in the following areas:

- I am planning to:

- I am having problems with the following in reaching my goals:

- Any other comments/suggestions/lessons learned:

- I would rate my personal happiness at: __________ (1-10) Why?

- You can pray for me in the following areas:

Hours this week____ Signature of Supervisor: ____________________________
Evaluation

Are we achieving the quality we expect and demand from ourselves? How will we evaluate our staff, programs, and organization?

**Evaluation Tools**

- Mentoring Evaluation Sheet
  — To be filled out before each mentoring session
- Staff Performance Evaluation
  — To be filled out each year at annual review
- Event/Program Evaluation Sheet
  — To be filled out after each program/event
- Small Group Evaluation Sheet
  — To be filled in before and after each small group meeting
- Staff Position Description
  — Blank worksheet to be filled in by staff person and supervisor
- Volunteer Position Description
  — To be developed for a volunteer position with supervisor support

**Others to develop:**
Mentoring Evaluation

Person met with____________________________________ Date____________

Brief summary of how the time was spent:

Personal information learned:

Prayer Requests:

Things to do before next meeting:

Any other ideas or needs discerned:
Title/name of staff member to be evaluated ________________________________

Name of person completing form ______________________ Date _________________

(Note: The information provided on this form may be shared with the minister you are evaluating.)

Please briefly describe your ministry role (involvement or interactions) as it relates to this staff member during the past year.

Please provide your feedback regarding the minister’s performance for each item listed below by circling the descriptor that best characterizes their performance during the past year.

(Note: For any item identified as poor or unacceptable include a description of the factors that have resulted in your assignment of this rating i.e. observed behaviors, comments, actions taken, etc…)

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17. Has this pastoral staff member ever treated you in an inappropriate or unprofessional manner?  
   Yes ___  No ___  If yes, please describe…

18. What does this pastoral staff member excel at in ministry?  What are his/her greatest strengths?

19. What one or two things could be changed about his/her job description that would bring him/her greater fulfillment and the church greater effectiveness?

20. What are his/her weaknesses?  How does he/she compensate for them?  How would you suggest improvement in these areas of weakness?

Please feel free to provide any additional comments in the space provided below:
Event Evaluation Sheet

Event Being Evaluated: ______________________________ Date: ______________

• Why did you come to the event? What were your expectations?

• What did you like best about the event?

• What suggestions do you have about how we can improve the event?

• How do you feel you are growing as a result of the event? What applications to your life do you have?

• Is there anything about the program/event that is upsetting you?

• Did you feel comfortable bringing your friends/family? Why? Why not?
**Small Group Plan**

| Write out an objective for the group meeting: |
| List key texts to read together and discuss: |
| How will you paint the historical picture? |
| List key themes to cover with cross-references: |
| List questions that may be raised by a group member and follow up Scripture you can use: |
| List creative ideas to use (game/drawing/chart etc…). |
| List illustrations from your life or from the Bible—other places where a character demonstrates a theme. |

**Passage:**

| Make a list of questions to ask that will help you draw out the group’s observations/interpretations of the Scripture: |
| List questions for application: |

**Evaluation:**

| How did I meet my objective? |
| How are specific applications being made? |
| What went well? What didn’t? How can I improve? |
Staff Position Description

Name:
Date of Employment:
Review Date:

Title of Position:

Purpose Statement of Position:

Person Reports to:

Relates Closely with:

People For Whom Responsible:

Continuing Responsibilities:

Primary strengths/gifts/talents:

Role Preference:

Top Three Current Measurable Priorities:

Budget Available: $_______

Time Required by Position: _______ hours per week

Salary $__________ per year

Accompanying Benefits:
Description:

Commitment:

Characteristics
To Cultivate

Ministry Skills
You will learn how to:

Life Skills
Specifics on the training and mentoring you will receive:

Relates Closely To:

Reports To:
Refinement

How can we be more effective and efficient in moving toward the ideal?

Input → Process → Output

Feedback

Steps

Preparation

Leading

Evaluation