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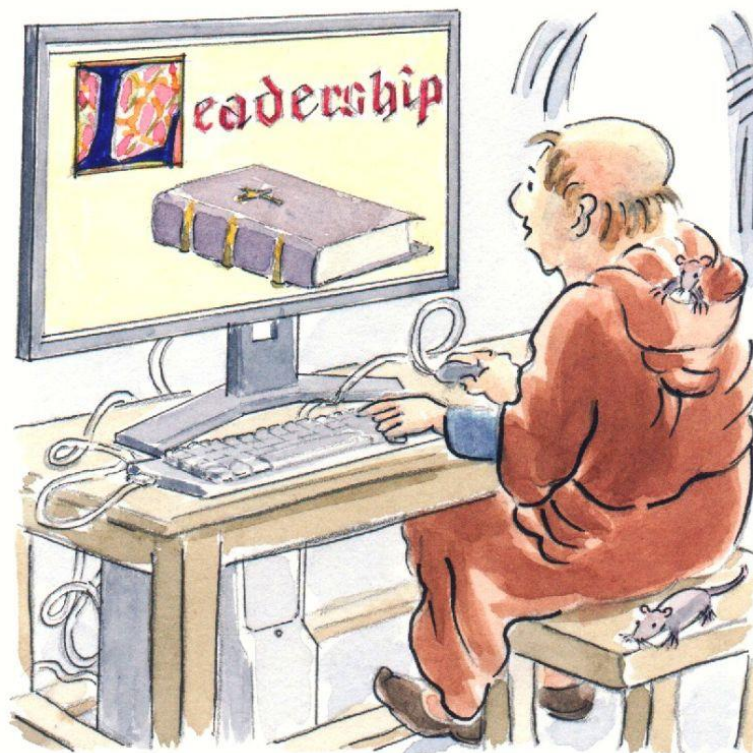
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# Strategic planning and organisation

*A day on self-organisation for clergy*



**Diocese of Blackburn – 9<sup>th</sup> September 2022**

These notes are also available as a digital file at  
<https://www.john-truscott.co.uk/News> and then the item for today's date.

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# Introduction: Four aspects of your life

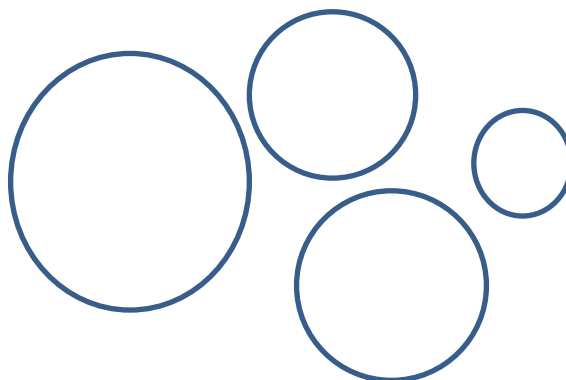
How do you fit them together?

Welcome to today's sessions for parish clergy on how we manage ourselves in the stress of life and ministry

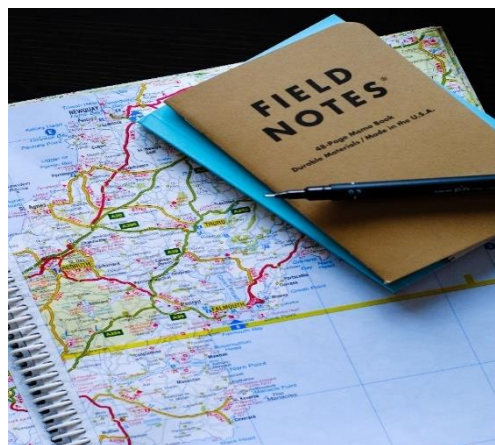
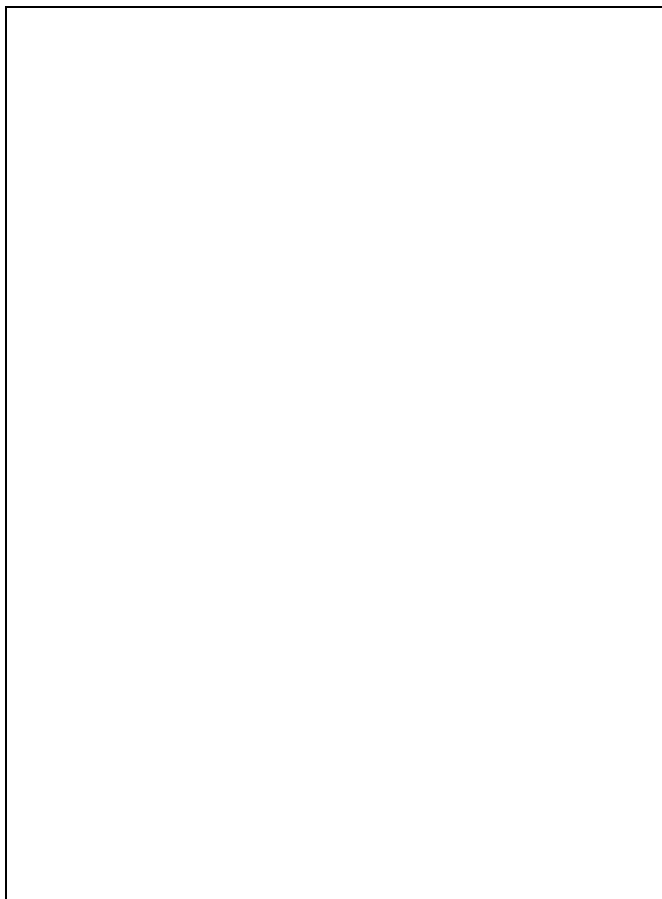
There are lots of back-up materials in the **Resources section of my website**, all of which are available to you without charge. You will find the main index page at <https://www.john-truscott.co.uk/Resources>.

But let's start with four circles. Label them

- **Your life** (yourself, your history, your family and friends)
- **Your ministry** (as a priest)
- **Your discipleship** (as a follower of Jesus Christ)
- **Your employment** (only add a fourth circle if you *also* have a paid job as SSM or other major responsibility)



Your task is to draw three (or four) circles in the space below to represent each of these, choosing appropriate sizes for the circles and an appropriate layout where the circles exist separately, overlap, or fit within each other in some way. What exactly the circles you draw represent is entirely up to you. This is an issue of how you perceive yourself and there is no right answer as such. You might like to return to this at the end of our sessions today. I will explain the two pictures on the right.



# A: Big picture thinking

The first need is for a clear context for your life and work

You cannot control your ministry and your life if you have no clear context in which you are working. First, others will control it for you. Secondly, you will have no criteria to enable you to plan the detail. Here are two possible approaches to determining a personal 'big picture'.

## A1: A typical planning process – but for your life

You may be used to ideas of purpose, values, vision, etc. for an organisation, but what about applying them first to you, and only secondly to your church(es)? Here is a jargon-proof set of questions (*with some explanation for those who cannot survive without the normal words!*).

- 1     **What do I long to see happen?**  
The 'big picture' vision for my life
- 2\*    **Why am I here?**  
The purpose question – but it is worth including negatives
- 3     **What am I aiming to do, and for whom?**  
An alternative for Q2
- 4\*    **What is the distinctive way I go about things?**  
This is a 'values' question
- 5     **What is my story so far?**  
The need to 'remember', and the value of a personal 'time-line'
- 6\*    **What might God do through me?**  
The main 'vision' question, but actually one of faith and prayer
- 7     **What are the main options open to me as I work towards this?**  
This is an issue of making choices
- 8     **What resources do I have and need?**  
Internal (eg. health, skills) and external (eg. people, finance)
- 9\*    **Where do I plan to get to this year?**  
This is what I term 'aims' – steps towards the 'vision'
- 10    **What are the stepping-stones towards these points?**  
Precise points by date or other measurable feature, what I term 'targets'
- 11    **Where may I get it wrong?**  
A very Christian question to ask at this point
- 12\*   **Where have I got to?**  
The issue of review

\* These form the key sequence of purpose, values, vision, aims and review. See Article A4, *Twelve questions to help you plan*, in the Resources section of my website for an application for a church as opposed to you.

Which one or two (no more) of the above questions do you feel you most need to ask now? And why?

**A2: Using the Ordinal** From Training Notes TN78 in the Resources section of my website.  
Here is a second idea, this time for your ministry rather than for your whole life.

## Your role

Your role is to lead God's people in the offering of praise and the proclamation of the gospel... You are to be a servant and a shepherd among the people to whom you are sent. You are to be a messenger, sentinel and steward of the Lord.

## Your responsibilities

### 1 **To proclaim the gospel**

You are to lead Christ's people in proclaiming the gospel, so that the good news of salvation may be heard in every place.....

### 2 **To baptise new disciples**

You are to baptise new disciples in the name of the Father, and of the Son, and of the Holy Spirit, and to walk with them in the way of Christ, nurturing them in the faith.

### 3 **To teach the Scriptures**

You are to teach and to admonish, to feed and provide for God's family, With others you are to make clear the Scriptures, to preach the word in season and out of season....

### 4 **To lead in worship**

You are to preside at the Lord's table and, with others, to lead his people in worship, offering with them a spiritual sacrifice of praise and thanksgiving....

### 5 **To minister to the world**

You are to resist evil, support the weak, defend the poor and intercede for all in need. You are to minister to the sick and prepare the dying for their death.

### 6 **To foster people's gifts**

Guided by the Spirit, you are to discern and foster the gifts of all God's people, that the whole Church may be built up in unity and faith.

### 7 **To stir up your own gift**

You are in, the strength of the Holy Spirit, continually to stir up the gift of God that is in you, to make Christ known among all whom you serve....

### 8 **To accept discipline**

You are to accept the discipline of this Church and respect authority duly exercised within it and, when necessary and with others, to minister such discipline yourself.

### 9 **To order your life**

You are to be diligent in prayer, in reading the Scriptures, and in all studies that will deepen your faith and fit you to bear witness to the truth of the gospel. You are to fashion your own life and that of your household according to the way of Christ....

Remember always with thanksgiving that you are entrusted with the privilege of leading Christ's own flock, bought by the shedding of his blood on the cross. It is to him that you will be accountable for your stewardship of his people.

You cannot bear the weight of this calling in your own strength, but only by the grace and power of God. Pray therefore that your love of people and your understanding of the Scriptures may grow daily. Pray earnestly for the gift of the Holy Spirit.

*adapted freely from Common Worship Ordination Services © Archbishops' Council 2013*

## A3: A reflection on time

Here are some statements about time management to consider when you have some, er, time. Ponder each one. Take your time to think about each carefully – there really is no hurry!



- 1 Time is the one commodity we all have in exactly equal measure. You cannot add one second to, or subtract one second from, the 86,400 we have each day.
- 2 But life is fragile and none of us has any idea how many more days we have available to us from this moment on. Several famous achievers died at an early age.
- 3 Time is a gift from God. It is a gift we can use, or one we can squander. Those who realise this most are probably those who have been close to death at some point.
- 4 'Time management' is therefore a meaningless idea. Time is fixed. It is our life or ourselves that we manage within the time that we have.
- 5 Some people have expectations as to what they should achieve that are simply not possible. These lead to feelings of guilt and despair. Jesus Christ said that he had finished the work that God had given him, yet thousands remained untaught, unhealed and unfed.
- 6 Once time has been wasted, it is impossible to replay the DVD. This is a subject more of personal discipline than slick techniques.
- 7 Any group will include those with a wide variety of approaches to life and ability to achieve. We are not necessarily wrong, just different (and, often, married to each other!).
- 8 Your own hyper-efficient life-style (if that could describe you) may depress other people who cannot keep up with you. Your very busyness may be a cause of great trouble to them.
- 9 Your own laid-back approach to time-keeping (if that could describe you) may cause others great difficulty (eg. when you miss a deadline they were depending on).
- 10 Scripture tells Christians to live life within the context of the Second Coming of Jesus Christ in glory. That is the time context for our discipleship.

**Matthew 6:27** (see No.1 in the list)

*"Can any one of you by worrying add a single hour to your life?"*

**John 17:4** (see No.5)

*"I have brought you glory on earth by finishing the work you gave me to do."*

**Galatians 5:22,23** (see No.6)

*But the fruit of the Spirit is .... self-control.*

**2 Peter 3:10-13** (see No.10)

*...Since everything will be destroyed in this way, what kind of people ought you to be? You ought to live holy and godly lives ...*

## B: Five key tools to choose

Only now are we ready for some practical ideas

### B1: 'Planning retreats'

You cannot do this kind of thinking on the job. Most of us need time away from all distractions. Hence the idea of a regular 'planning retreat'. The agenda is to REVIEW, PRAY and PLAN. So:

- A day or part-day away six times a year
- A termly 36-hour event
- An annual few days on your own

You may want to use

- A friend's house or a cottage somewhere in the country
- A retreat house of any kind
- Just going out for a long walk not too close to home.

If you work best in a team setting, you may want to adjust this idea and go away as a team or with one or two of those you know from your college days. But the key points are that:

- This is neither 'a management session' nor a 'retreat' but a 'planning retreat'!
- It needs to go in the diary early on and not be bullied by more urgent needs.
- You need to go 'away' from your normal environment and from distractions.
- The longer the better – include at least one night away if that is possible.

For further thinking on this, read Training Notes TN54, *Creating space for a Planning Retreat*, on the website.

What decision could you take today that will eventually result in your having a planning retreat?

### Resources on my website you might find helpful on today's theme

<https://www.john-truscott.co.uk/Resources>

#### Articles

- A4 Twelve questions to help you plan – *revised into a slightly different context on page 1 above*  
 A25 Working from home – boundaries, discipline and space  
 A27 Reliability in ministry – for administrators and leaders  
 A36/37 Sorting out your study – the space and the stuff in the room  
 A51 The 'To Do Diary' guide

#### Training Notes

- TN6 The Minister's role in larger churches  
 TN7 Ideas for how to make time for life  
 TN11 Keeping a time log  
 TN23 How to do 'To Do' lists – *see page 11 in these notes*  
 TN40 Appointing a Church Administrator  
 TN43 Did Jesus use an iPhone? – essential reading to back up today's material  
 TN54 Creating space for a Planning Retreat – *see this page!*  
 TN57 Clear your clutter!  
 TN62 Know what distracts you  
 TN67 Stress and the Christian worker – the main website resource on this theme  
 TN70 Do's and don'ts for a new leader  
 TN78 The role of a church leader – *this is the background to page 2 in these notes*  
 TN84 How to say 'No' when you should – *see page 10 in these notes*  
 TN106 Talk about taking time 'off'  
 TN112 Set my leaders free!

Ask to come on to my mailing list to inform you of new items. Follow me on Twitter @johnntruscott.

## B2: The art of saying 'No' .... with grace and without guilt

We need to understand something about expectations placed on us:

- 1: Our own
- 2: The diocese
- 3: Our colleagues
- 4: Our parish
- 5: Our church members
- 6: Our family and friends



### Why you may find it so hard to say 'No'

### Assess the request

- Listen carefully
- Ask questions
- Activate the pause button
- Give yourself time and space to pray and ponder
- Consult your 'team'
- Beware agreeing to something in the distant future
- Block off activity time in your diary
- Check out alternatives
- Check out the urgency
- Make suggestions for next time

### Ask yourself questions of:

- Priority
- Promises
- Time taken
- Completion date
- Enjoyment
- Preventing others
- Hurting others
- Pressure
- Replacement
- Developments

And remember, it is better to say 'No' now .... than 'Yes' and fail to deliver.

### How to say 'No'

- 1 Say something positive first
- 2 Say the actual word 'No'
- 3 Smile
- 4 Never lie but do not give too much away
- 5 Don't over-apologise or feel guilty

For more on this theme, see Training Notes TN84, *How to say 'No' when you should*, on the website.



## B3: The 'To Do Diary'

I keep coming across people whose 'To Do' lists are causing them extra stress and little practical help. They are misusing this simple tool. To make them work:

- 1 Differentiate tasks by how long you expect them to take**  
Some jobs will take five minutes, others may take several hours. Putting them next to each other on one list is not very sensible.
- 2 Differentiate tasks by when you need to do them**  
Nothing is more demoralising than having a 'To Do' list that never empties. So schedule when you will do things in a realistic way, and then complete your activities each day!
- 3 Differentiate tasks by how important they are**  
Have some idea of what will have to drop off if you are too pressed and what must be done whatever happens. Also what could be done by others and what must be done by you.

And hence the idea of a diary rather than the back of an envelope. Here is a page layout that allows you follow all three of the above principles.

A5 diary page:

TIMED ENGAGEMENTS (inc timed phone calls, etc.)
MAIN TASKS
QUICK ACTIONS

**... but how are you going to deal with 'interruptions'?**



A system such as this (design one that fits you) helps you not to forget anything that you need to do, ensures you do it on schedule, and allows you to relax.

You fill it with daily issues that tell you of things to do, plus the monthly listing on the next page that needs then to be fed into a daily diary of this kind.

Some clergy tell me that the idea works a treat, but they prefer to work it on a weekly diary basis rather than a daily basis. Fine – find what suits you best.

For further detail on this idea, see Training Notes TN23, *How to do 'To Do' lists* for an outline or, for fuller detail, Article A51, *The 'To Do Diary' guide*, on the website.

## B4: A monthly calendar

The idea here is to plan your year month by month. This then feeds into the To Do Diary.

### Think 'aims' – specific projects

Your role is at heart fairly static, but within that context you need specific priorities or aims for each period (say, each year). Most of these will be what you want to achieve by a given date.

If you have clear priorities in life or ministry, where do you need to get to by, say, this time next year? This is bringing the big picture planning down in scale.

Aims change year by year, unlike purpose. They can include ideas of activity, relationships, seasonal issues, personal discipleship. In a parish you might have specific aims you wish to achieve by the time you move on.

My aims for this calendar/academic year

### Then add dated events throughout the year

You may have specific deadlines you need to meet at various points in the year. These might include

- Deadlines that are some way ahead: eg. special services or speaking engagements, booking your family holiday, planning your move from curacy (if applicable).
- Regular activities not to be forgotten: eg. a bimonthly magazine article deadline.
- Monthly/weekly activity that needs to be fitted in: eg. sermon preparation, claiming expenses.

### And so: a monthly calendar

This acts as a monthly reminder of out-of-the-ordinary activity. It does not give specific dates (we get to that in a minute) but lists what needs to be done that month.

This is the half-way stage between the big picture priorities for the year and the daily detailed activity. It links the two.

It is NOT putting exact dates on when you do stuff but does show monthly deadlines by when you intend to have it done.

If you feel this might work for you, what is the first action to take on it when you get home?

## B5: Planning for interruptions, pack/unpack, time off

Interruptions can be what you are in ministry for, or distractions from what you should be doing. It's vital to know the difference! For the latter it helps to state your availability and stick to it, to stand up rather than sit down (in person or on the phone) and have a plan for those who interrupt regularly (especially work colleagues).

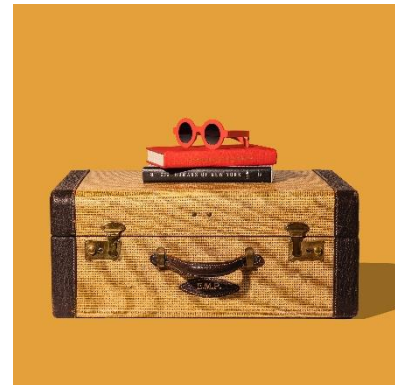
### Interruptions you regard as part of your ministry and accept / welcome

Budget time for them – these are your ministry

### Interruptions you feel you must manage and deal with in other ways

Many clergy leave little planned time for event preparation and none for unpacking afterwards.

### Pack and unpack time needs to go in the diary for every event



But one of the biggest killers is the lack of time 'off', daily, weekly and annually. Issues to consider:

- 1 Location – especially when the home is the workplace
- 2 Length of time – the evening before the day, a two-week break once a year
- 3 Emails, phone, social media – is it right to do screen work on holiday?
- 4 The value of rhythm in daily life – consider the monastic life

Refer back to p4 and see Training Notes TN62, *Know what distracts you*, and TN106, *Talk about taking time 'off'*, in the Resources section of my website.

### Every Christian worker needs to study and apply the Sabbath principle

# C: The challenges of home working

Part of the solution is simply to identify the problem

## Particular challenges

Not all of these will apply to everyone today and some will say this is what Christian ministry is all about. And, of course, there are *many positives to working on your own from home*. But:



### Your space is shared

People invade your home both personally and by phone. This may be couples coming for marriage preparation, church members dropping things in, people coming for church meetings. Ideas to lessen any damage:

### It's hard to switch off

There is no commute from home to work and no peace at mealtimes or days off, even if voicemail is on. Reminders of your work are all around you – there is little separation between home life and ministry. Ideas to lessen any damage:

### Personal and work admin get muddled up together

Post and email come in for both. It may be a servicing contract for the boiler at the cottage you own or the church boiler. It may be a bill for your holiday or the church weekend. Your study serves both areas. Ideas to lessen any damage:

### You are separated from your work colleagues

It is difficult to work as a team when you all work from home, or if others work from church premises and you work from home. You lose the value of daily interaction at the coffee machine. Ideas to lessen any damage:

### You may live in a goldfish bowl

Especially if your home is next to the church and visible, people may be only too aware of what washing you put on the line, what time you get up, or when the children are misbehaving. Ideas to lessen any damage:

### If single, you can feel very isolated

You come home from an emotionally draining meeting or a difficult funeral service to find no shoulder to cry on, no one who has prepared supper for you, and the housework needs doing and, perhaps, children looking after. Ideas to lessen any damage:

### If married with a family, they can feel cheated

They have to be on their best behaviour at home while the Standing Committee meets, and your spouse has to see visitors invading their house and leaving coffee cups for them to wash up afterwards. Ideas to lessen any damage:

## Some possible people-ideas for home-workers

### **'Employ' specialists**

Working alone you lack Specialists who can help you on a project basis. You no longer have an HR or IT department to call on when you work from home. But it is unlikely that you will have expertise in all the areas you need. Some of the obvious ones will be as follows. Some of these people will be volunteers but some could be paid.

### **IT, social media, email, website**

I could not survive without people I can call on to sort out my computer when it plays up, to advise me on software I need, to check my broadband is secure, to purchase new equipment for me when I need it. I have neither the skill nor the time to do this.

### **Cleaning or gardening**

Especially if you live alone and these are not your 'thing'.

### **Training in your ministry areas**

CMD or equivalent is essential if you are to grow in your ministry. You have to invest time in your own training, both for skills but also for spiritual growth, especially if you are continually giving out. The 'experts' here are normally speakers at events to go to.

### **Meet regularly with an accountability partner**

It can be helpful to meet with someone in the same position as you are in, to share difficulties and ideas for solutions, and to pray for each other and any families you have.

You may prefer the idea of a mentor, spiritual adviser, or someone with more experience of working from home in Christian ministry who will listen to you and offer advice.

If married, you may want to work as a couple with other couples in this way as often it can be the spouse who suffers more than you do. You may be revelling in your ministry while they wonder if they signed up for this when they married you.

There are special issues if both members of the couple are ordained. Meeting with another couple in the same position can help – and an external pastor who has permission to ask you both awkward questions at any time can work well.

If single it is important to meet other people not part of your ministry. And in all cases it is NOT weakness to admit you need help. We all do.

### **Appoint a Responsible Gofer**

If you need administrative help (and you will), think not so much in terms of a 'Secretary' who needs to be directed at all times, but of a highly responsible Personal Assistant with initiative who will run errands, take charge of routine work that takes time, and act as an adviser for you. Male or female.

They may need to work from your base, although this poses a range of problems. It is more likely that they will work from their base but undertake some work at yours.

This may be a Parish Administrator but does not have to be. This is a combination of routine (phoning round to rearrange a meeting, sorting the filing out, etc.) and the provider of wisdom in areas where you are weak (devising systems, taking charge of your diary, etc.).

The main need will be flexibility in time week by week, but there can be value in project management skills too such as sorting out the study. But there are also dangers which we might discuss.

See Training Notes TN126, *The small-church administrator*, on the website for more details of this.

## The discipline of fighting distractions

We are all easily distracted, especially from those long and difficult tasks such as a major writing project or sermon preparation. The reasons why this is particularly relevant for many clergy:

- 1 Lack of **natural discipline and accountability** for those who work largely on their own or outside a normal management structure.
- 2 Little **effective support and encouragement** for much of Christian ministry.
- 3 High **expectations from different parties**, and criticism or conflict when these are not met.

What can you do for yourself and others to minimise these?

Here is a possible list of distractions if you find it helpful to have them analysed under particular headings. Some of these will be no problem in your case – the idea is to identify the few that are real issues and then to take some positive action on just them.

### **Being at home** (all good stuff but in the right place and at the right time)

- 1 – Family
- 2 – Pets
- 3 – Jobs to do
- 4 – Food and drink

### **Messages** (here you have to judge whether interruption is the real thing or distraction)

- 5 – Telephone
- 6 – Emails
- 7 – Post
- 8 – Callers at the door

### **Reading and listening** (like many of these ideas, self-control is a key element)

- 9 – Radio/TV
- 10 – Internet
- 11 – Books/magazines
- 12 – Others in your view

### **Administration** (our attitude to admin is almost more important than technique)

- 13 – Buildings to look after
- 14 – Untidiness
- 15 – Business
- 16 – Easy jobs

### **Worry** (a major time-stealer)

- 17 – External nuisance
- 18 – Lack of peace
- 19 – Poor health
- 20 – Responsibility

If you want to test yourself on all these, see Training Notes TN62, *Know what distracts you*, on the website.



## Now you can design the space

### Serve your purpose

#### Position the desk

- Purpose of the room
- Location of the windows
- Location of fixed items
- Other large items
- Spaces for more than one person

#### Minimise clutter

See Training Notes TN57, *Clear your clutter!*, on the website.

#### Go vertical

- Shelving
- Trays

#### Work safely

- Wiring and sockets
- Weight at height
- Floor accidents
- A safe environment
- Equipment and children
- Fumes
- Security

#### Let work flow

#### Plan the layout

## Handling paperwork and IT files

We don't have time to cover this today but you will find it all in Article A37 on the website. The three key areas you need to work on are:

### 1 Sorting

### 2 Filing

### 3 Categorising

The headings on this page come from Articles A36 and A37, *Sorting out your study*, on the website.

# Action plan

So what are you going to do about it?

The main lessons I have learned in this material

Some new ideas which I have picked up

The main actions I need to take now as a result

The people I need to talk to in connection with this

The time I shall set aside (within one week) to review my notes and plans

My target for achievement by Christmas 2022

Visit my website at <https://www.john-truscott.co.uk> and see the Resources section for various items (downloadable without charge) relevant to today's theme. Ask to come on to my mailing list so you receive notification of new items six times a year.

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