

## ANNUAL CYCLE OF PLANNING AND EVALUATION

One goal of a governance change is to free the board to spend more time thinking about the future while empowering staff to get things done efficiently right now. The annual cycle in figure 8.1 shows how this can happen. The board's work runs across the top part of the diagram; across the bottom is the staff's work. In the middle, on the level that begins with *planning retreat*, are activities that fall into the shared zone, where board and staff work together. Because figure 8.1 depicts a cycle, you might imagine wrapping it around a cylinder so that it repeats year after year.

A key annual event is the board's planning retreat. The senior clergy leader always participates, and depending on the planning focus in a given year, the board invites others to participate as well. The retreat agenda includes devotions and socializing; time for thoughtful and expansive conversation; and also time for practical work, like orienting newcomers and divvying up tasks and roles.

As always with retreats, the ideal is to meet away from usual haunts—somewhere where, if the phone rings, it's not for you. For the same reason, a clear agreement to limit cell-phone use is a good idea. Staying overnight helps separate the retreat from daily work and fosters flexibility of thinking. These benefits are hard to imagine ahead of time, but they make a big difference. As a retreat facilitator, I have often heard board members say, "I voted against spending the money to meet off-site. But I was wrong. This retreat will pay for itself many times over."

At the retreat, the board creates two major products: a set of *open questions* about the congregation's future and an *annual vision of ministry*. Both

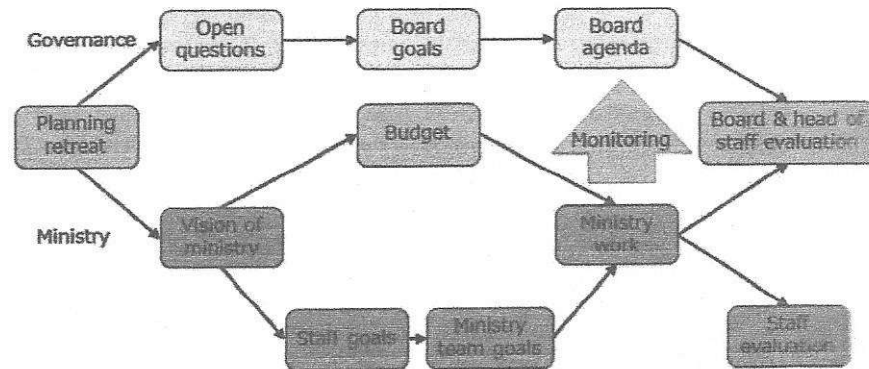


Figure 8.1. Annual Cycle of Board-Staff Collaboration.