



**Connectional Lay Organization (CLO)**  
**Strategic Planning Launch: *Let's Get Started***

May 2024

# Meet Our Strategic Advisor: Marie C. Johns



*Corporate Leader,  
Entrepreneur, and  
Former Civil Servant*

- Retired telecommunications executive and business advisor
- President Obama appointee - Deputy Administrator of US Small Business Administration
- Extensive record of board service - e.g., Girl Scouts USA; DC Chamber of Commerce; CityFirst Bank; DC Judicial Nomination Commission, and Howard University
- Nearly 40-year member of Metropolitan AME; over 15 years on Senior Board of Stewards; currently serving as Pastor's Steward



# Using a Strategic Lens to Envision the Future

At its core, strategic planning is about envisioning the future and determining the best course of action to achieve that vision. It's an ongoing participatory process that involves:

- Setting objectives
- Assessing the internal and external environments
- Defining strategies
- Implementing plans

**Strategic planning is a systematic process that requires a deep understanding of the organization's current position and its desired future state.**



# Why strategic planning is a continuous journey...

Strategic planning is a process—it's not a singular event, but rather, involves a continuous improvement cycle that includes:

- Setting and monitoring goals,
- Developing measurable metrics and milestones for existing priorities,
- Identifying, developing, and advancing new strategic priorities, and
- Ensuring a culture of self-evaluation, innovation, agility, and adaptability.

**Strategic planning provides a roadmap for the future and ensures that the organization is prepared to meet the challenges and seize the opportunities that lie ahead.**

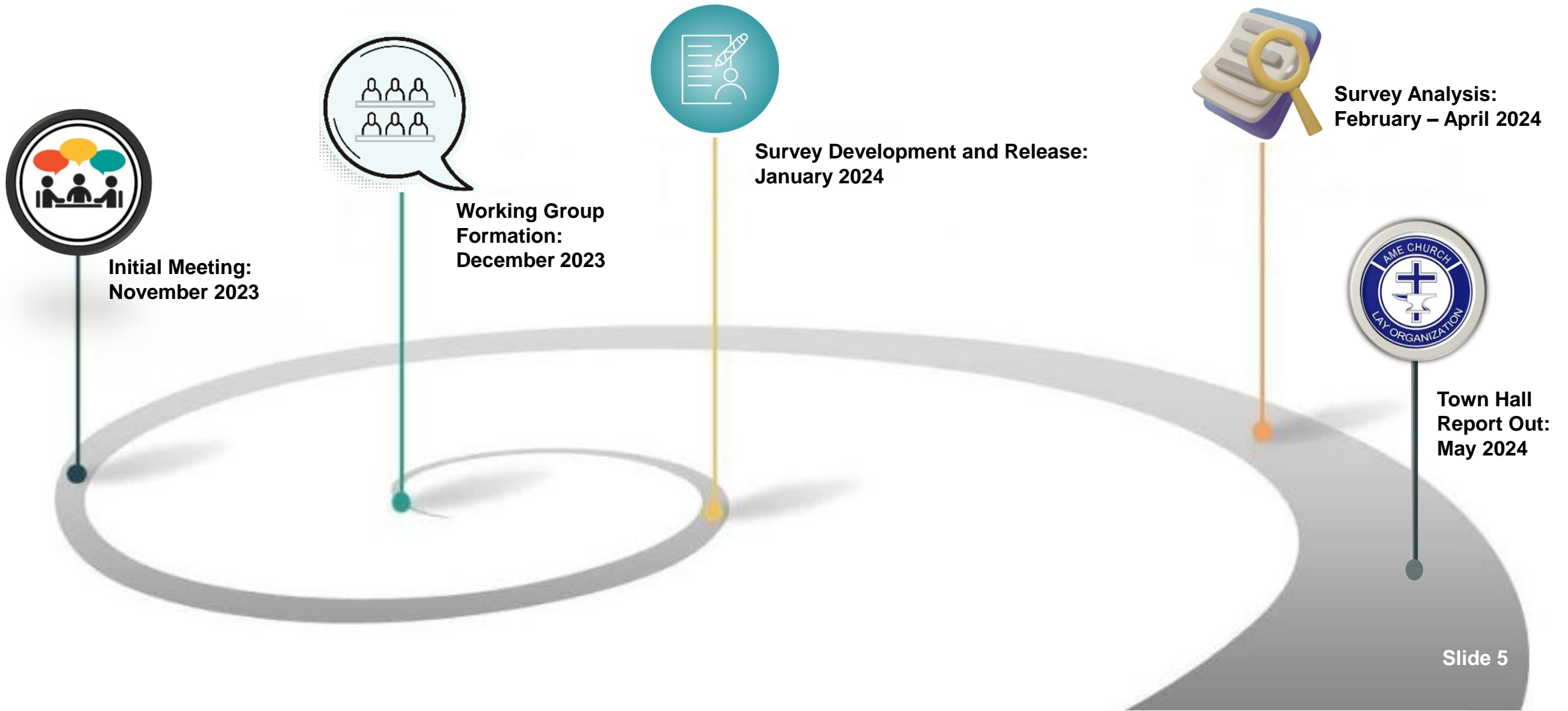
While it requires time, effort, and commitment, the benefits of strategic planning are clear.


- ✓ It creates a unified vision,
- ✓ Addresses biases in decision-making,
- ✓ Enables progress tracking, and
- ✓ Sets the organization on the path to achieving its long-term objectives.

**With the right approach and commitment, strategic planning can transform an organization and propel it to new heights of success.**



# Strategic Planning Development Timeline





**The Connectional Lay Organization (CLO), under the leadership of President Abe Makiti, is undergoing a timely and comprehensive strategic planning process.**

To support this effort, an evaluation survey was released in January 2024. The survey was designed to gain the input of lay members around the future strength, direction, and accountability plans of the CLO, in service to current members and upcoming generations of parishioners.

The survey link was accessed by 1,337 AME members (clergy and laity). There were 883 responses collected, which is a completion rate of 66%.

Following are highlights of trends that arose in the survey. These data trends offer important perspective on focus areas of the strategic planning process.

## Data Trends and Areas of Concentration

### **Trend 1: Reinforce the CLO Mission**

48% of respondents were “very familiar” with the CLO mission. Nearly the same percentage of respondents, 43%, said they were “somewhat familiar.”

#### **Related Point:**

There is ambiguity in the CLO’s ability to effectively carry out its mission over the next five years, i.e., Over 44% of respondents are confident about this five-year aim, but more than 45% of respondents are unsure the CLO can attain this goal.

### **Trend 2: Revitalize Lay Organization Membership**

More than 48% of respondents noted that membership in their local lay organization has decreased.

#### **Related Point:**

Membership engagement is a point of concern. Nearly 67% of respondents said there is “room for improvement,” in terms of the manner in which CLO members are engaged.

*Note: While more than 68% of respondents think the CLO is headed in the right direction for future growth, 31% responded that they do not think the lay mission is moving in the right direction for future growth.*



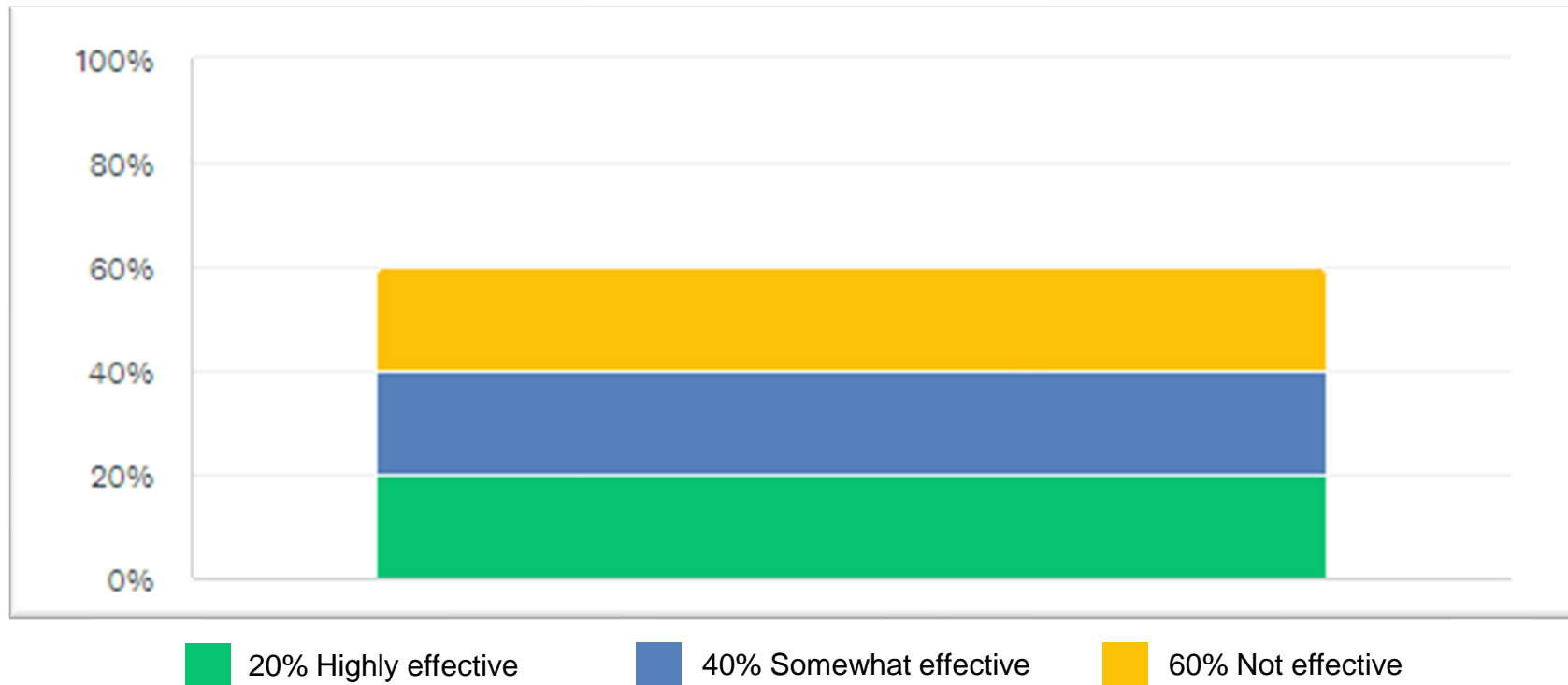


## Actionable Steps for Consideration

- Mission: Create onboarding experiences for new lay leaders and include resources that help concretize the CLO mission – among parishioners as well as the broader community
- Membership: Invite former lay members to a worship service and a Reclamation Brunch following; ask them to bring a guest; develop a program to provide updates on interesting lay activities

*Measurable goals that help track progress and evaluate the effectiveness of strategies, tactics, and implementation efforts are integral to success. Outcomes should inform a continuous improvement process.*

### **\*Trend 3: Improve the effectiveness of local church lay organizations**



**Related Point:** 60% of respondents selecting “not effective,” in terms of key components of on-the-ground activities of local churches, is an important trend to address as a part of the strategic planning process. It is also integral to the tactics devised to ensure a continuous improvement process.

*\*In the case of a multi-select question, the number of responses may exceed the number of participants, which can cause the response percentage to exceed 100%.*

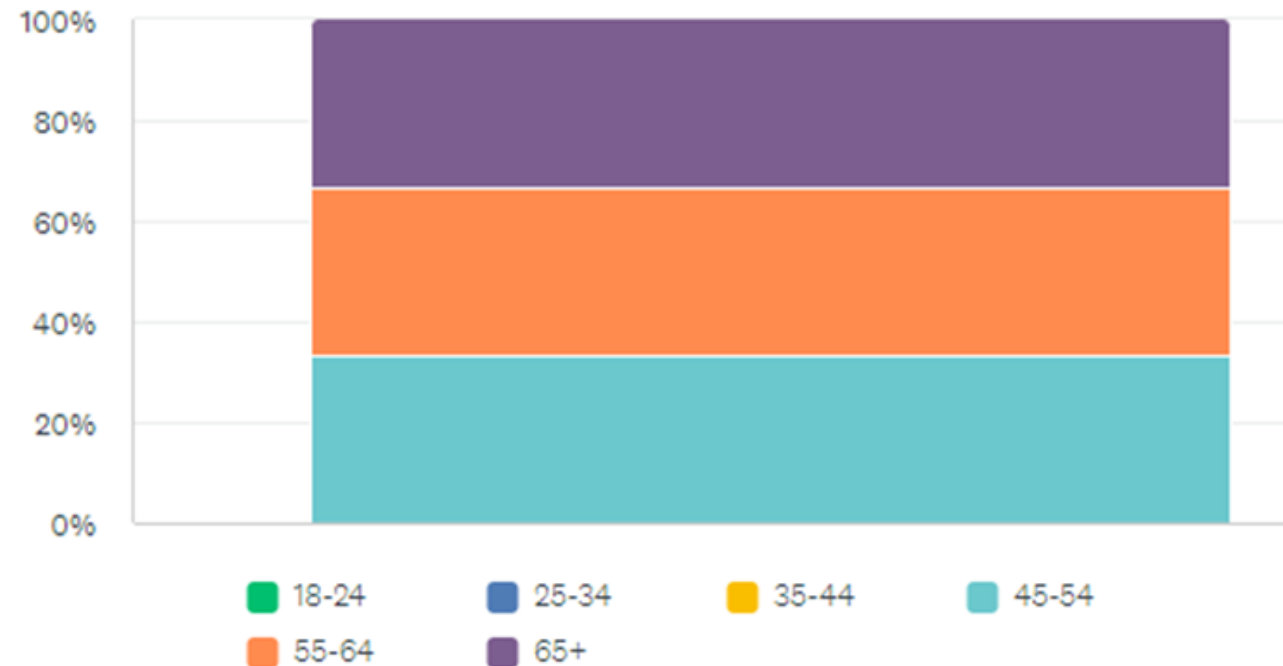
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# Actionable Steps for Consideration



- Develop strategies that support regular engagement and mission-critical initiatives for various audiences, for example:
  - ✓ Host focus groups to gain insight from church members broadly as well as past lay members.
  - ✓ Reassemble focus group respondents to share feedback—so that they know you heard them and are working to address their concerns.
  - ✓ Develop an educational series “teach-in” that offers a deep-dive around the CLO mission:
    - Consider using local church members and invited special guests to support intergenerational dialogue, panels, etc. to build awareness and understanding.

#### Trend 4: Improve outreach to younger populations



**Related Point:** Of 809 response to this question, there are no responses from anyone under the age of 45. This is an important consideration as “next generation” engagement is critical to church growth, participation, leadership, and effectiveness at all levels.





## Actionable Steps for Consideration

- Special events and engaging community-based events that attract young people, e.g.,
  - ✓ Host a Meet-and-Greet or Networking Brunch
  - ✓ Organize a community clean-up or other intergenerational activity
  - ✓ “Get out the Vote” event
  - ✓ Civic engagement
  - ✓ Activities for families/children, etc.



# Strengthening Connection and Engagement with Regular Church-Goers

- While not explicitly identified in the survey driving the CLO Strategic Process, any effort designed to amplify the CLO should include considerations around ways to strengthen connections to and engagements with the people in the pews on Sunday, e.g.,
  - ✓ Ways to involve worshippers in ongoing activities
  - ✓ Outreach efforts to share news of the many ways regular church-goers can support extended efforts of the church/CLO, etc.





# Next Steps: Mission and Membership Abide Together

## I. Mission: Operationalize the mission through...

- Training/onboarding leaders.
- Improved awareness of the CLO, generally, and its mission specifically.
- Input and support around future-focused initiatives.
- Consistent practices at all levels that connect to the mission.

## II. Membership: Utilize best practices in membership recruitment, engagement, and retention, including...

- Ensuring a welcoming environment for all.
- Improved administration of membership records.
- Rich and robust data management, e.g., members, prospective members.
- Strengthened outreach – including targeted outreach to young people and families, via direct mail and social media.
- Outreach tactics, membership recruitment, and onboarding materials that clearly define the role of the CLO, membership requirements, and expectations to drive parishioner engagement.



# Guiding Principle: Create a Culture of Accountability

III. Consider the SIMPLE acronym: Use this device as you work with lay colleagues during today's breakout sessions:

**S**

Set expectations  
through clear  
communications.

**I**

Invite  
commitment.

**M**

Measure  
progress.

**P**

Provide  
feedback.

**L**

Link to  
consequences.

**E**

Evaluate  
effectiveness.

Excerpted from [Equipping Lay Venture Leaders](#) (Market Square Books, 2021) by [Kelly Brown](#), Lewis Center for Church Leadership.



*"Accountability should not be defined as a punitive response to something going wrong. Accountability means preventing something from going wrong."*

[Winning with Accountability](#)

by [Henry J. Evans](#)

Founder and CEO (Change Excellence Officer) for Dynamic Results, LLC



# Breakout Session

## Activity: Roses, Buds, Thorns

Our work today...

Using this technique, spend time in your sessions reflecting on and building upon the **Actionable Steps for Consideration** outlined.

Breakout session facilitators will guide you through this work.

Notetakers in each session will gather and distill all comments to support a report out at the close of breakout sessions.

This technique is derived from design thinking methodologies, and the template frame is divided into three main areas:



Roses are successes, small wins, or work/efforts that are blooming.



Buds are new ideas with the potential to bloom with a bit of feedback or support.



Thorns are challenges you have experienced or anticipate, or areas where you could use more support.

# Group Share: Breakout Session Report Outs and Next Steps

- Membership Discussions
- Mission Discussions
- Group Think Opportunities: What are our takeaways, next steps?
  - ✓ In thinking about the report outs from these discussions, what next steps can we all commit to move our strategic planning process forward?
  - ✓ What are three concrete objectives that we should build out and execute?
  - ✓ What is the timeline associated with each key objective and related metrics?
  - ✓ When should we plan to reconvene to share progress?



# Leading By Example: 2024 CLO Working Group Members

We recognize and thank the CLO Working Group Members for their enduring commitment to our strategic plan process:

Bro. Matikane Makiti  
President

Dr. Dorothy Henderson  
First Vice President

Bro. Simon Losoko  
Second Vice President

Mrs. Patricia H. Wright  
Director of Lay Activities

Sis. Jamesha Williams  
Young Adult Representative

Dr. Jacquelyn Dupont-Walker  
Working Group Member

Sis. Wanda Sims  
Parliamentarian

Bro. Kgosi Monaisa  
Working Group Member  
19<sup>th</sup> Episcopal District

Dr. Tamara Bonner Royster  
Working Group Member  
9<sup>th</sup> Episcopal District

Sis. Gloria Byrd  
Advisor to the President







# Thank You!

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For more information on our strategic planning process, contact a member of the CLO Working Group.