



Strategic Planning

Zion Lutheran School
Anaheim, California

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Van Lunen Fellowship
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My Van Lunen Project:

Zion Lutheran Church and Schools sits on a 7 acre campus in Anaheim, California. The church was founded in 1903 and opened a school shortly thereafter. The school closed for a period of 10 years during the war and reopened and has been continuous since 1939. We have strong ties in our community and have seen many changes in our community demographics over the last 10 years. Zion consists of an active congregation worshipping between 300-400 on a Sunday, an elementary school with 143 students, a preschool program with 75 students, and a School-Age Care program serving students before and after school. We use the term schools because our ministry consists of the 3 school areas. The Schools have always been viewed as a critical ministry for Zion.

The demographics of Anaheim have changed drastically over the last 20 years giving the part of Anaheim located near Zion that of an inner city. The neighborhood within our two mile radius is made up of 98% Hispanics. Reaching beyond those two miles, the demographics change drastically again and the Hispanic population drops to about 65%. However, our challenge is bringing people on campus, once they set foot on campus they feel safe, secure, and comment on our beautiful facilities. Enrollment in the Elementary school has decreased drastically over the last 10 years as a result of the economy and people relocating to more desirable neighborhoods. The school went from financially supporting the church to needing financial support from the church. A few people including the Pastor have expressed concerns over the school being a burden for the church. During our 2011-2012 WASC Accreditation, one of the critical areas for us to follow up with was Strategic Planning. We did not have any type of Strategic Plan in place to keep Zion moving forward. With the help of Bruce Hekman, it was determined that Strategic Planning would be the best project for me during my Van Lunen experience.

During the beginning months of summer 2012, Zion's Board of Directors approved working with a consultant, Paul Brandt, from the Pacific Southwest District (PSD) of the Lutheran Church Missouri Synod to help lead us through the Strategic Planning process. Some felt this was needed to help "fix the school" not fully realizing Zion Lutheran Church and Schools needed direction. This presented itself our first obstacle that would lead to more of my Van Lunen focus. Information was gathered over the summer, and sent to be reviewed by the PSD consultant. A survey was developed and given to school families, teachers, staff, and congregation members in early October. The data from the survey was compiled by the PSD

consultant and shared with staff, teachers, School Board members, Board of Director members, Preschool Director, Principal, and Pastor at the end of November. It was at this point where the division between the church and school became very apparent. Critical feedback was provided that gave opportunity for reflection. It was at this point my Van Lunen consultant, Rob Elliott, became very helpful and a huge resource for me personally and professionally. I began reading *Critical Confrontation* and *The Advantage* by Patrick Lencioni as two assignments for the winter session of Van Lunen and felt these reading were directed specifically toward Zion. It became very clear to me that a critical confrontation was going to be needed in order to move things forward for Zion Lutheran Church and Schools.

During the winter session, my Van Lunen mentor, Jim Marsh, and I decided a critical confrontation was going to need to take place between the pastor and myself to move things forward. I knew, for me personally, I needed to have some things answered in order to move things forward with Zion or know that it was going to be time for me to move forward with a new ministry. I needed to have this conversation so I knew personally that I had done everything possible. Planning began, praying was constant, and the support and encouragement from my Van Lunen Fellows were instrumental in allowing me to have this discussion with my Pastor. I knew we would need to speak openly about some topics and comments made in reference to the direction of Zion.

This critical confrontation, this conversation, was one of the most difficult and stressful conversations I have ever prepared for. The meeting was scheduled 3 different times, and the 3rd meeting actually took place. My Van Lunen consultant gave me questions to think about, and allowed me to practice dialogue. After scheduling the critical conversation, and having to reschedule 3 different times truly had me questioning the conversation. However, our Lord truly has a plan and purpose for everything. It was part of His timing that allowed this open and honest conversation to take place. The Pastor and I spent about 2 ½ hours speaking very openly about the survey results, comments made by him, and how I felt about the relationship between the church and school. Our pastor truly opened up, and made himself very vulnerable. He became very transparent, and shared he was not sure whether he had the skills needed to lead. It was at this meeting when a relationship began to be mended. For the first time in a very long time, I felt hope. Hope for the pastor and myself, and hope for the future of Zion!

This new hope is leading to change. A commitment was made to have regular meetings to communicate. For me, this was the most critical step in moving Zion forward and the beginning

that was needed for our work on the strategic plan to truly begin. Pastor and I have kept our commitment and are meeting regularly. We have been working through the results of our survey. We have grouped the results into 5 big areas: #1 - Internal Improvements such as Accountability, Communication, and Customer Service; #2 – External Improvements such as facility improvements, curriculum purchases, and a new one-to-one technology plan; #3 – Funding Plan such as third source funding and a balanced budget; #4 – Stabilize and Improve Enrollment/Worship; #5 – Vision to refocus Zion and improve our Spanish ministry. These areas need the most work. We are in the process of developing steps for these areas that will be shared with the consultant. Then the consultant will come and meet with the leaders, congregation members, and school families. Our initial plan was to have this meeting take place in June at our annual Voter’s Meeting, however, this timeline needed to be adjusted and will be pushed back to the fall after the summer break.

Another area that has been developed as Pastor and I work to communicate and build our relationship is our spiritual gifts. Pastor and I discussed our gifts and talents and worked through *The Strength Finder* book. As a result, we decided some changes could be made to lead our administrative staff meeting more effectively. I led the administrative staff through this book as well and my consultant from Van Lunen helped me plan some activities to build trust within our team. The Pastor acknowledged that leading meetings was not his strength. He also recognized that this is a strength of mine and has asked me to lead our weekly administrative staff meetings. This is still a work in progress, but we are on our way to more efficient and effective meetings that allows us to plan ministry and not focus only on the day to day operations.

What did you learn?

This past year has been an incredible experience! I have gained enormous confidence as a leader. My mentor and consultant have been very instrumental in this growth. I recognize the gifts God has given me and have been able to put them to better use.

- I have been more assertive in making things happen. Since I am a very task oriented person, I wanted the job done, completed, and organized on my timeline. That did not happen, and we definitely are not where I expected this project to be. However, significant progress has taken place and things are moving forward. I find that I am going to need to be the person who moves our strategic planning forward. People don’t like strategic planning, but it is critical for our organization to move forward and focus on the

future rather than the past or day to day activities. I am feeling more comfortable with being the “watch-dog” or “time-keeper”.

- Patience has been practiced. I have most definitely learned patience. As I mentioned, I am the type of person who likes to get things completed and move onto the next project. This project has taught me a lot about myself as well as the importance of involving others. It has taught me a lot about the process, and that the process takes time.
- Critical confrontations are difficult. I feel I have been successful in asking tough questions, expressing my concerns, and sharing my needs. And I know for a fact that would not have been possible without this Van Lunen experience.

How has Zion changed?

Zion is a better place because of this incredible Van Lunen experience! Even though our strategic plan is not fully completed, enormous progress has been made. I feel the Pastor and I are much better aligned with our vision for the ministry of Zion. We have recommitted our passions to see Zion succeed and thrive in the midst of a new look to our neighborhood, and to share the love of Jesus and His powerful message. We are working on getting our stakeholders involved and empowering them to take an active role in carrying it out.

Work has also been done to generate additional income through third source funding to balance the school side of the budget through our new International Ministry program. We had 67 students on campus last winter for two different weeks which allowed us to share the Gospel of Jesus Christ to students from Beijing, China and add \$11,000 of additional income. This summer, we have 30 students coming with a projected \$8,000 of additional income to be added to our school budget. We have established relationships with two different schools in Beijing, and we are planning for three different groups of students to come this next school year. They will attend Zion to hear God’s Word and allow our students to be missionaries right here on the Zion campus. Again, the confidence gained has allowed me to implement this new program.

On a personal note, words cannot begin to express my appreciation for this incredible Van Lunen experience. The growth, confidence, and patience learned over this past year have truly made me a more effective leader and has been a true blessing. I genuinely thank you for this opportunity to learn, network, and grow. What an AMAZING gift! What an AMAZING year!