

Planning that Works

Effective approaches to developing the right type of plan in congregational settings

WELS National Conference on Lutheran Leadership

January 2026



Opening Questions

- How many of you would dare go on a trip today without a GPS or some clear set of directions?
- How many of you would go to a restaurant with no stated menu or type of food they serve?
- How many of you who have served on a council like 3-hour meetings and no clear direction when done?
- How many of you have been part of planning sessions that ended without clarity or didn't have follow-up or follow-through?
- How many of you came here today to walk away with a silver bullet (so to speak) for any plan to work?



Flow for today

- ① **Balancing Expectations**
- ② **Relating a Few Terms**
- ③ **Necessary Ingredients to Plan**
- ④ **Some Tools & Example**
- ⑤ **Let's talk**

What prompted you to attend?

Some quick disclaimers regarding the session and how you might reflect on the content to best fit your needs and the objectives of your respective congregations and schools.

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Coordinating Terms

What is a **strategy**?

What is a **plan** and what types of plans do I need?

- **Strategic Plan:** Big picture, long-term vision
- **Tactical Plan:** Mid-level, departmental actions
- **Operational Plan:** Daily execution details

How do plans and strategy **relate to** each other and to the **broader mission**?

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What makes a good plan?

Congregational Vision, Mission and Values are key guides in aligning objectives, the work that accompanies strategies to meet the objectives, and decisions that leaders and the congregation at large will make.

But that is just the foundation. We'll explore elements that will help plans take shape and become a living document.

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Tools and Examples

We will focus on three ingredients and provide practical examples that you can use, modify or use to create your own approach.

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Questions? Comments?

As time allows, we will share time addressing thoughts that otherwise were not covered during the earlier discussion and presentation.

Balancing Expectations



Defining Strategy and Plans



Strategy



Strategy



General
Definition



Strategic Plan



Tactical Plan



Operational
Plan

A **strategy** is a high-level approach or method for achieving long-term **goals** and fulfilling an organization's mission. It defines the *direction* and *priorities* by answering questions

Where are we now?

Where to we want to go?

How will we get there?

What is a Plan?



Strategy



General
Definition



Strategic Plan



Tactical Plan



Operational
Plan

A **plan** is a deliberate arrangement of actions, resources, and timelines designed to achieve a defined objective. It serves as a guide for decision-making and execution, reducing uncertainty and aligning efforts toward a common goal.

Strategic Plan



Strategy



General
Definition



Strategic Plan



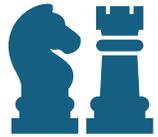
Tactical Plan



Operational
Plan

A **strategic plan** is a comprehensive, long-term framework that articulates an organization's vision, mission, and core values. It **identifies major goals and priorities**, assesses internal and external environments, and sets a direction for sustainable growth and impact.

Tactical Plan



Strategy



General
Definition



Strategic Plan



Tactical Plan



Operational
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A **tactical plan** translates strategic objectives into actionable initiatives for specific departments or teams. It defines *how* goals will be achieved, including timelines, budgets, and performance metrics.

Operational Plan



Strategy



General
Definition



Strategic Plan



Tactical Plan



Operational
Plan

An **operational plan** provides detailed instructions for day-to-day activities that support initiatives and an operation generally. It specifies tasks, responsibilities, and timelines at the granular level

Stays Steady

Changes over time



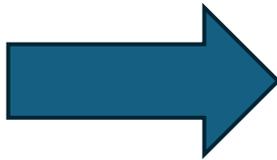
Values



Mission



Vision



Operational
Plan



Tactical Plan



Strategic Plan

Purpose

18-Month Strategic Ministry Plan Statement (Oct 2025 – Mar 2027)

Vision: To cultivate a spiritually vibrant, welcoming, and mission-driven church community that nurtures youth and families, strengthens internal discipleship, and extends Christ's love to our neighborhood.

Strategic Goal: Strengthen youth and family ministry within the congregation, followed by intentional outreach to neighborhood families with children, offering spiritual support and invitations to engage with our church community.

Tactical Plans – OKRs by Ministry Focus Area

1. Worship & Facilities

Objective: Enhance worship experience and maintain a safe, welcoming facility.

- **KR1:** Complete 3 key facility upgrades (e.g., lighting, technology upgrades, child care room) by Q2 2026.
- **KR2:** Increase worship attendance by 20% through improved environment and engagement.
- **KR3:** Train 10 new volunteers for worship support (materials, ushers, greeters, tech, music) by Q1 2026.

2. Christian Education & Discipleship

Objective: Expand and enrich youth and family discipleship programs.

- **KR1:** Launch a weekly youth and parent (family) Bible study by Jan 2026 with at least 10 regular attendees.
- **KR2:** Develop youth events and church service programs for calendar year 2026 by December 15 2025
- **KR3:** Recruit and train 4 new youth ministry volunteers by Mar 2026.

3. Outreach & Community Engagement

Objective: Build meaningful relationships within the community and with neighborhood families.

- **KR1:** Participate in 6 community events focused on families and children by Mar 2027.
- **KR2:** Distribute 100 family devotional kits in the neighborhood by Q3 2026.
- **KR3:** Establish communications and social media strategy by Q4 2025.
- **KR4:** Recruit and train 3 volunteers for communications and social media updates by Jan 2026.

4. Member Care & Fellowship

Objective: Deepen member engagement and spiritual care.

- **KR1:** Launch a monthly family fellowship night (or small group program) starting Jan 2026.
- **KR2:** Implement a member care tracking system by Dec 2025.
- **KR3:** Re-engage 75% of inactive members through personal outreach by June 2026.

5. Organizational Stewardship

Objective: Strengthen leadership, communication, and resource alignment.

- **KR1:** Finalize and implement role descriptions for all council and elder positions by Nov 2025.
- **KR2:** Develop a quarterly ministry dashboard to track progress on OKRs by Jan 2026.
- **KR3:** Identify and invite 25 volunteer to use their talents and time in ministry plan activities through targeted recruitment and training by June 2027.
- **KR4:** Formally develop and launch a Church Technology Committee by Jan 2026 to manage audio/visual systems and digital service delivery.
- **KR5:** Create a financial support plan for new investments beyond the current budget, including fundraising strategies and grant opportunities, by Q1 2026

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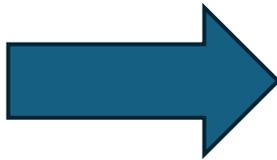
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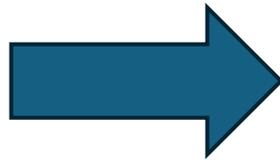
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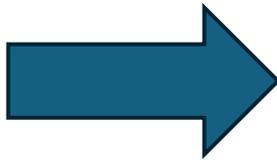
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Strategic Plan

Monthly Operational Plans by Council Area

Evangelism

- Plan and execute one outreach activity per month (e.g., flyer distribution, social media campaign, neighborhood walk, etc.).
- Coordinate with Education and Member Care for follow-up on new contacts.
- Track engagement metrics and report to council.

Education

- Maintain weekly Bible classes and Sunday School.
- Review and update curriculum quarterly.
- Host monthly (quarterly?) teacher support/training sessions.
- Prepare and distribute one family devotional resource every other month.

Stewardship

- Monitor monthly budget and expenses.
- Prepare quarterly financial reports for council.
- Organize one stewardship education session per quarter.
- Coordinate annual giving campaign (start planning in Q2 2026).

Facilities & Maintenance

- Conduct monthly facility and grounds inspections.
- Maintain list of weekly facility needs and assigned volunteer or service.
- Schedule routine maintenance tasks (HVAC, cleaning, yard work, safety checks).
- Prioritize and plan for facility upgrades (based on strategic goals).
- Coordinate volunteer workdays quarterly.

Elder Committee

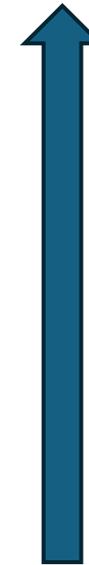
- Hold monthly elder meetings to review member care needs.
- Assign follow-up visits or calls for new and inactive members.
- Support spiritual development through prayer groups and mentoring.
- Collaborate with Education and Member Care for youth and family support.

Purpose

Usually Bound together



Specific, Actionable, Short Term



Comprehensive, Directional, Long Term

Necessary Ingredients to Plan



WISDOM



GUIDE



AWARENESS &
ASSUMPTIONS



IDEAS &
BRAINSTORM



APPROACH



ACCOUNTABILITY



ENGAGEMENT



EXECUTE AND
CONTINUAL
IMPROVEMENT

Wisdom: Prayer and Petition. Asking questions,
learning, applying, adjusting
The Word leads!

Necessary Ingredients to Plan



WISDOM



GUIDE



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IDEAS &
BRAINSTORM



APPROACH



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EXECUTE AND
CONTINUAL
IMPROVEMENT

Guide: Knowing your Purpose, Vision, Mission, & Values. Also consider Imperatives*

Necessary Ingredients to Plan



WISDOM



GUIDE



AWARENESS &
ASSUMPTIONS



IDEAS &
BRAINSTORM



APPROACH



ACCOUNTABILITY



ENGAGEMENT



EXECUTE AND
CONTINUAL
IMPROVEMENT

Awareness & Assumptions: What do you know about the community, your church, your people. What can you assume about external influences?

Necessary Ingredients to Plan



WISDOM



GUIDE



AWARENESS &
ASSUMPTIONS



IDEAS &
BRAINSTORM



APPROACH



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EXECUTE AND
CONTINUAL
IMPROVEMENT

Developing Ideas: Based on what we know, what can we address? What are we strong at? What opportunities? Any improvements? What will be needed to succeed?

Necessary Ingredients to Plan



WISDOM



GUIDE



AWARENESS &
ASSUMPTIONS



IDEAS &
BRAINSTORM



APPROACH



ACCOUNTABILITY



ENGAGEMENT



EXECUTE AND
CONTINUAL
IMPROVEMENT

Approach: The tools (means/methods) to support the development of strategies and their related plans & actions, which align with the mission and respect awareness and ideas.

Necessary Ingredients to Plan



WISDOM



GUIDE



AWARENESS &
ASSUMPTIONS



IDEAS &
BRAINSTORM



APPROACH



ACCOUNTABILITY



ENGAGEMENT



EXECUTE AND
CONTINUAL
IMPROVEMENT

Accountability: Measures and metrics to assess how the plans are proceeding. Roles and responsibilities defined to move the plan forward and report back on progress and timeframes.

Necessary Ingredients to Plan



WISDOM



GUIDE



AWARENESS &
ASSUMPTIONS



IDEAS &
BRAINSTORM



APPROACH



ACCOUNTABILITY



ENGAGEMENT



EXECUTE AND
CONTINUAL
IMPROVEMENT

Engagement: Communicate and gain consensus. Request help from those who have the gifts to help. Support the groups that take on tasks. Coordinate. Communicate again.

Necessary Ingredients to Plan



WISDOM



GUIDE



AWARENESS &
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IDEAS &
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APPROACH



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EXECUTE AND
CONTINUAL
IMPROVEMENT

Go! Refine!: Do the work. Assess what is happening. Adjust as needed. Learn how to be successful in the current situation.

Focus on Three Ingredients

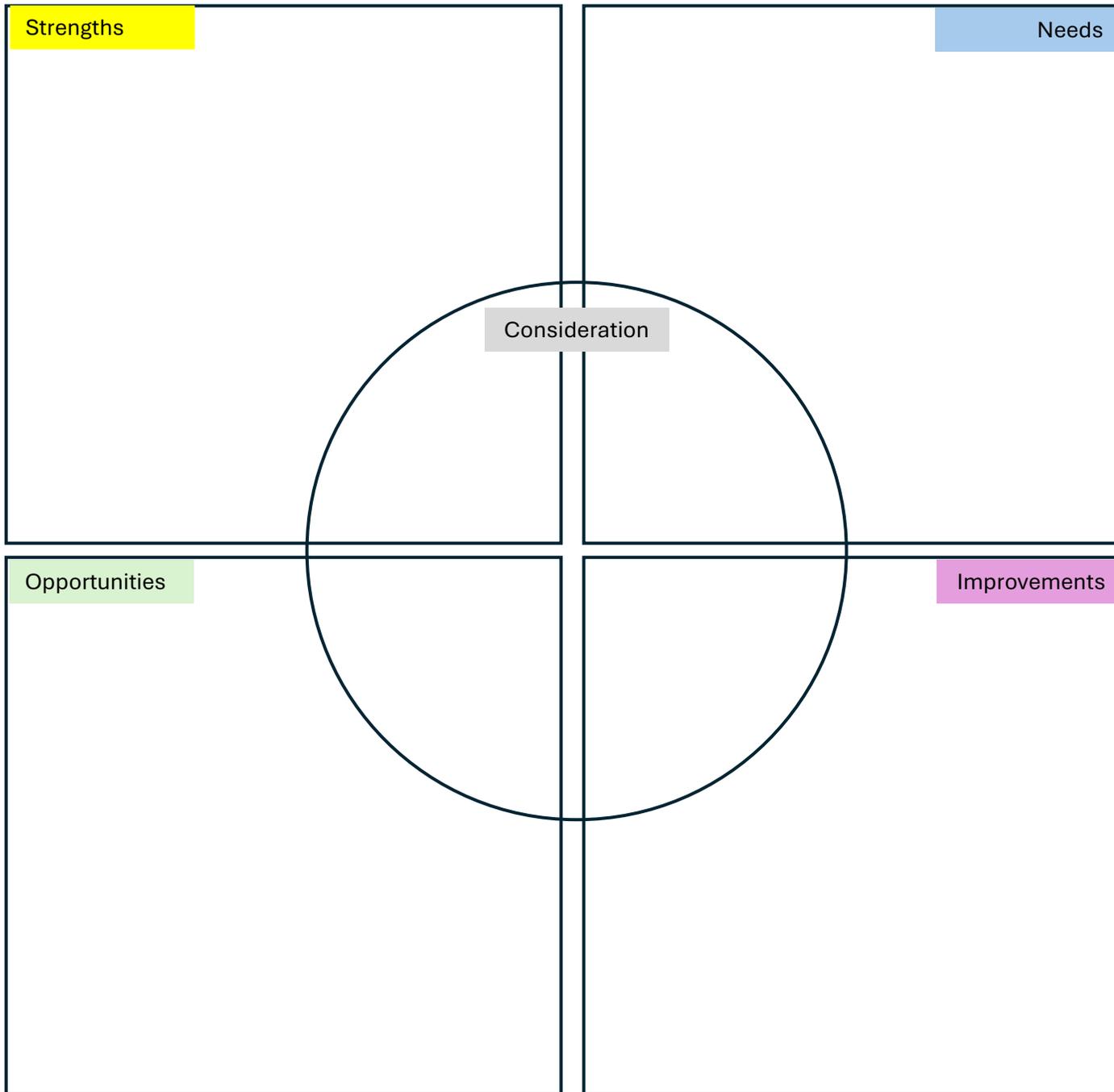




Group Brainstorm

- Developing the Goals
- Organizing Thoughts



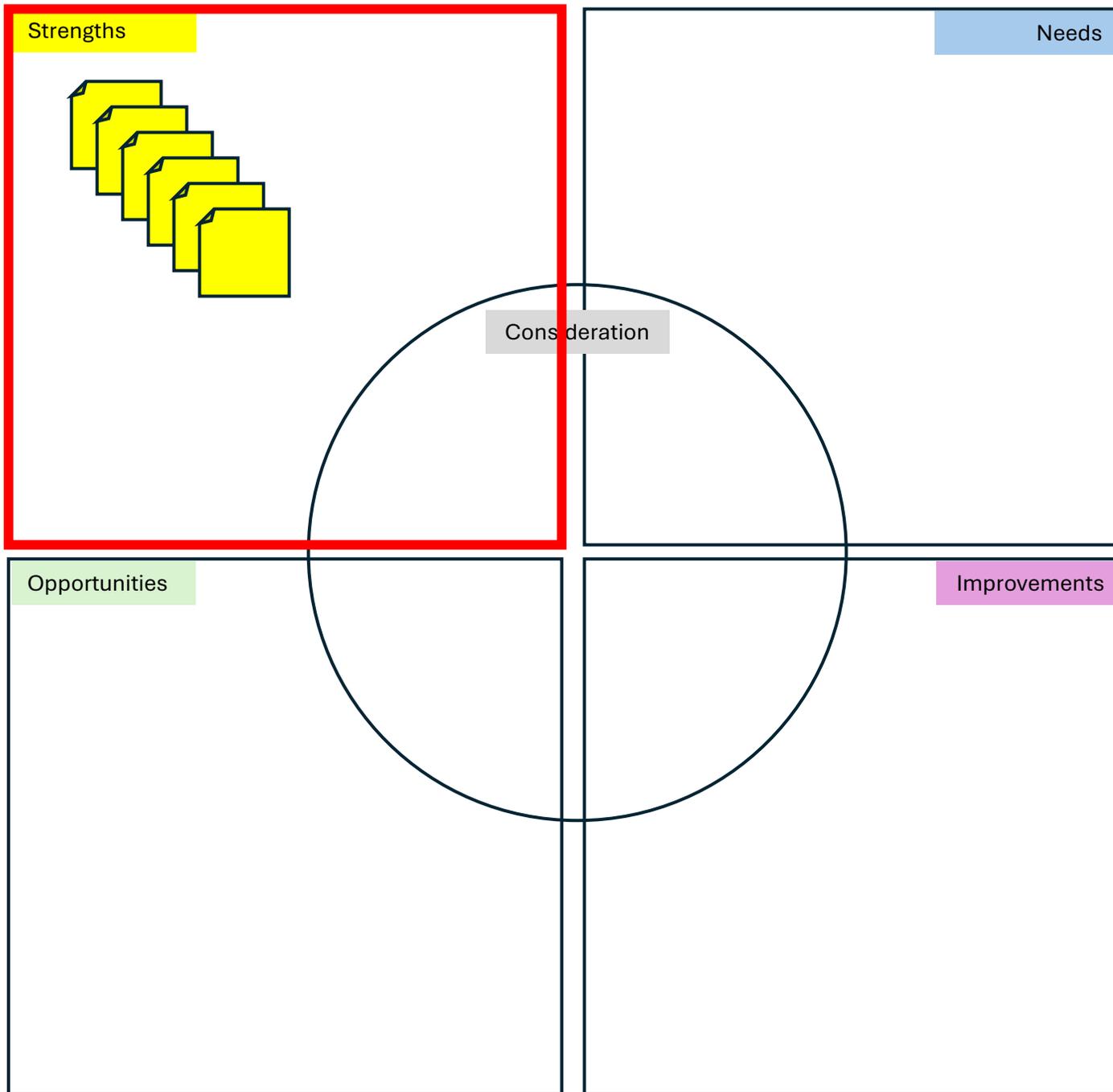


SONIC*- Strengths, Opportunities, Needs, Improvements, Consideration

Why not SWOT – Strength, Weakness, Opportunity, Threat

- Weakness is often difficult to quantify and harder (in volunteer organizations) to address. It is better to think about needs the organization has (we need to do X or Y vs. we are not good doing A or B).
- Part of this is simply mindset, moving from a negative context to a positive context – Every barrier is penetrable (all things are possible through God).
- Threats are things you can't control – it is an outside force. While it's good to have resiliency in planning, spending too much time on things you can't control takes creative time away from developing plans on things you can do and things you can mitigate. I would rather consider risks than threats.
- Using SWOT, I've often found that a number of the same things fall in both weakness and threats. I have had better success using this model to get unique, actionable items.

* - Approach adopted from Mike Cardus (mikecardus.com)



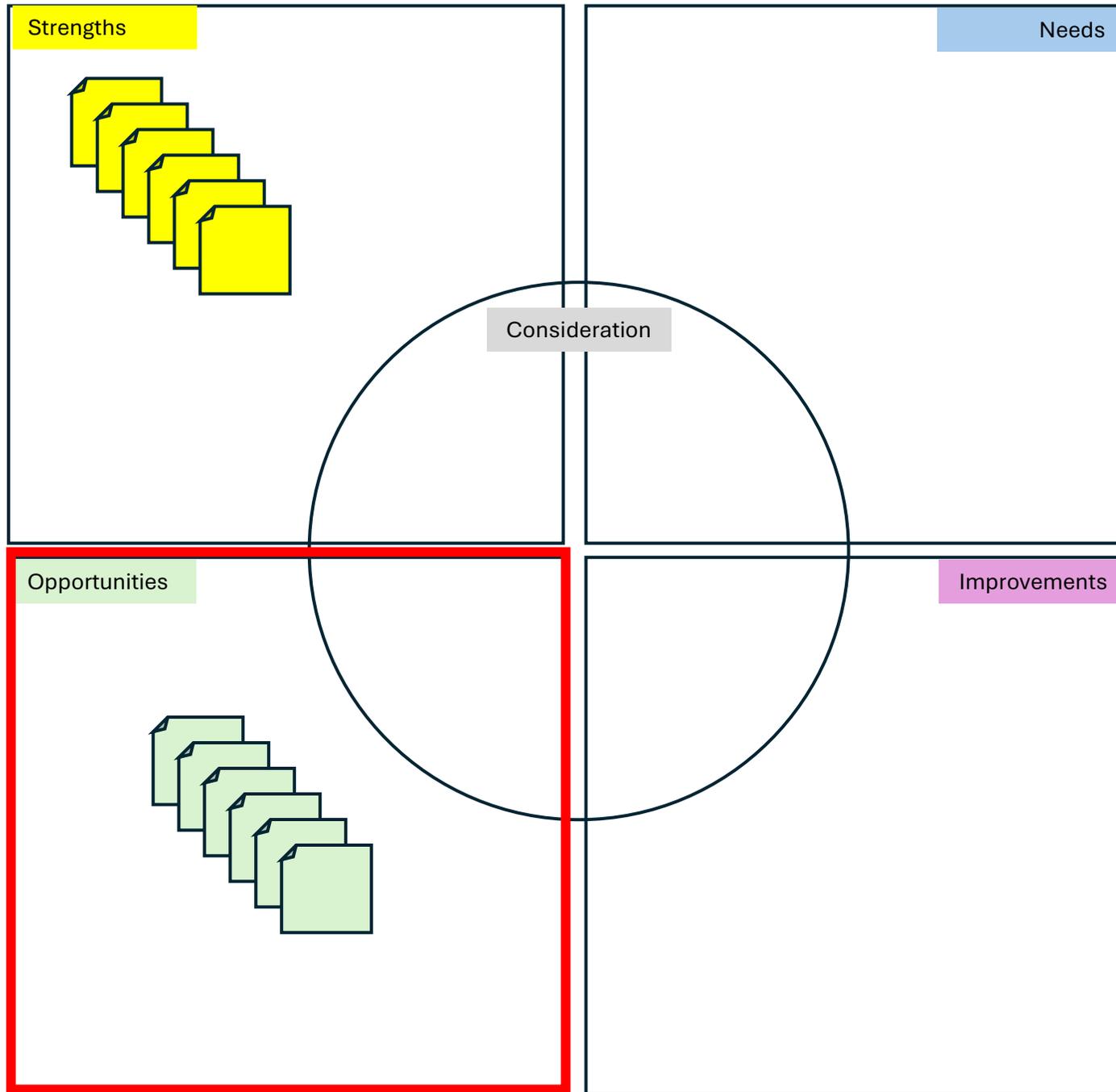
SONIC*- **Strengths**, Opportunities, Needs, Improvements, Consideration

Strengths: Start here.

Strengths are things internal to your organization or various skills or programs (initiatives) we you have that are within our control.

- What is working well (worship, Bible study, core groups, fellowship, etc.)?
- How do you know?
- What are things your congregation (or members of) are good at?
- Examples?

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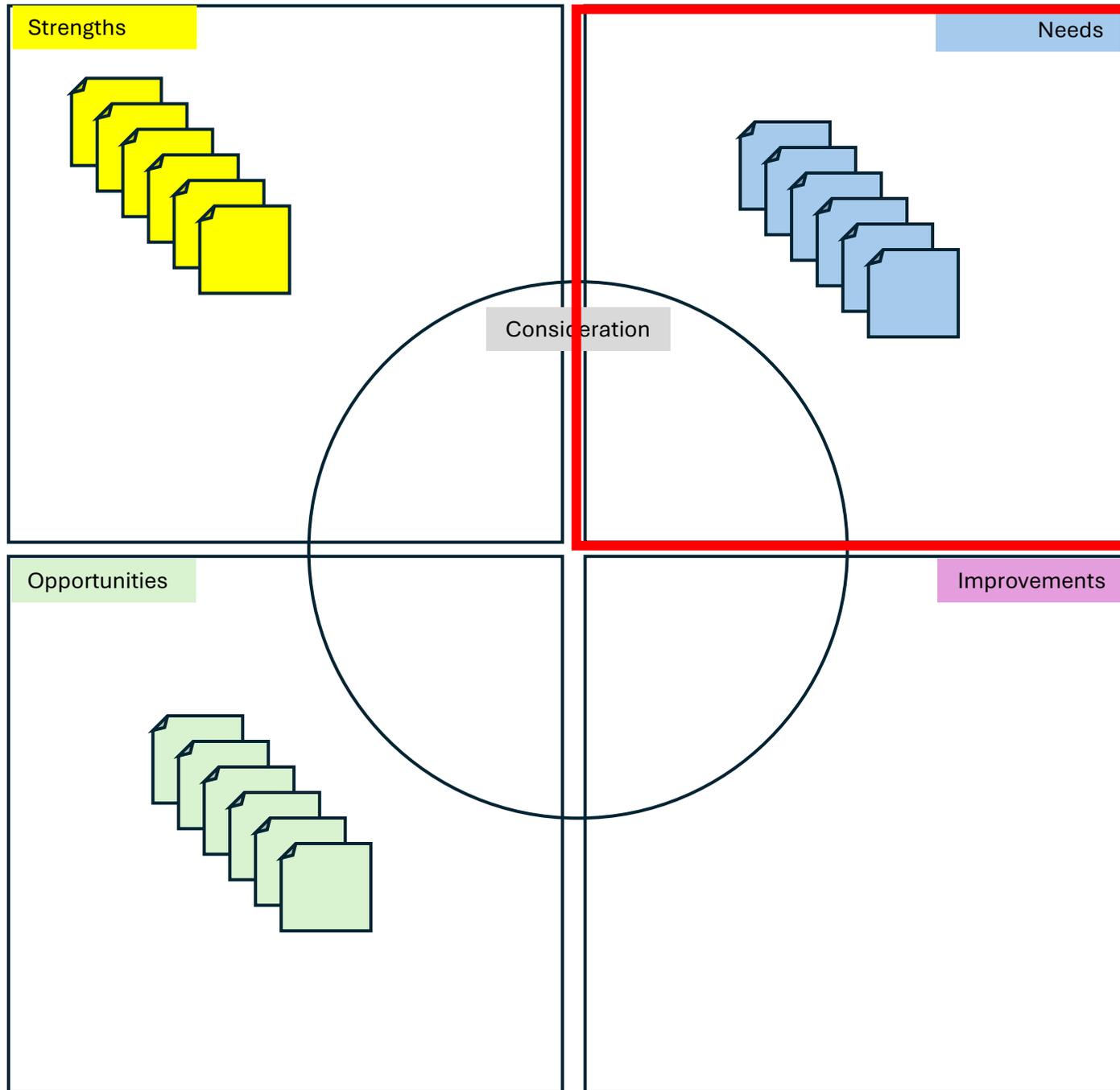
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Opportunities:

Opportunities should be treated as new things (internal or external) that the organization should (or could) develop. Ideally, these already exist in some fashion, meaning we are not creating something new, unproven or untried..

- Other locations/churches/teams / etc. are doing
- An area of untapped talent OR under-utilized resources
- What do we currently have that we can use differently?
- What opportunities are we missing that we ought to be aware of?

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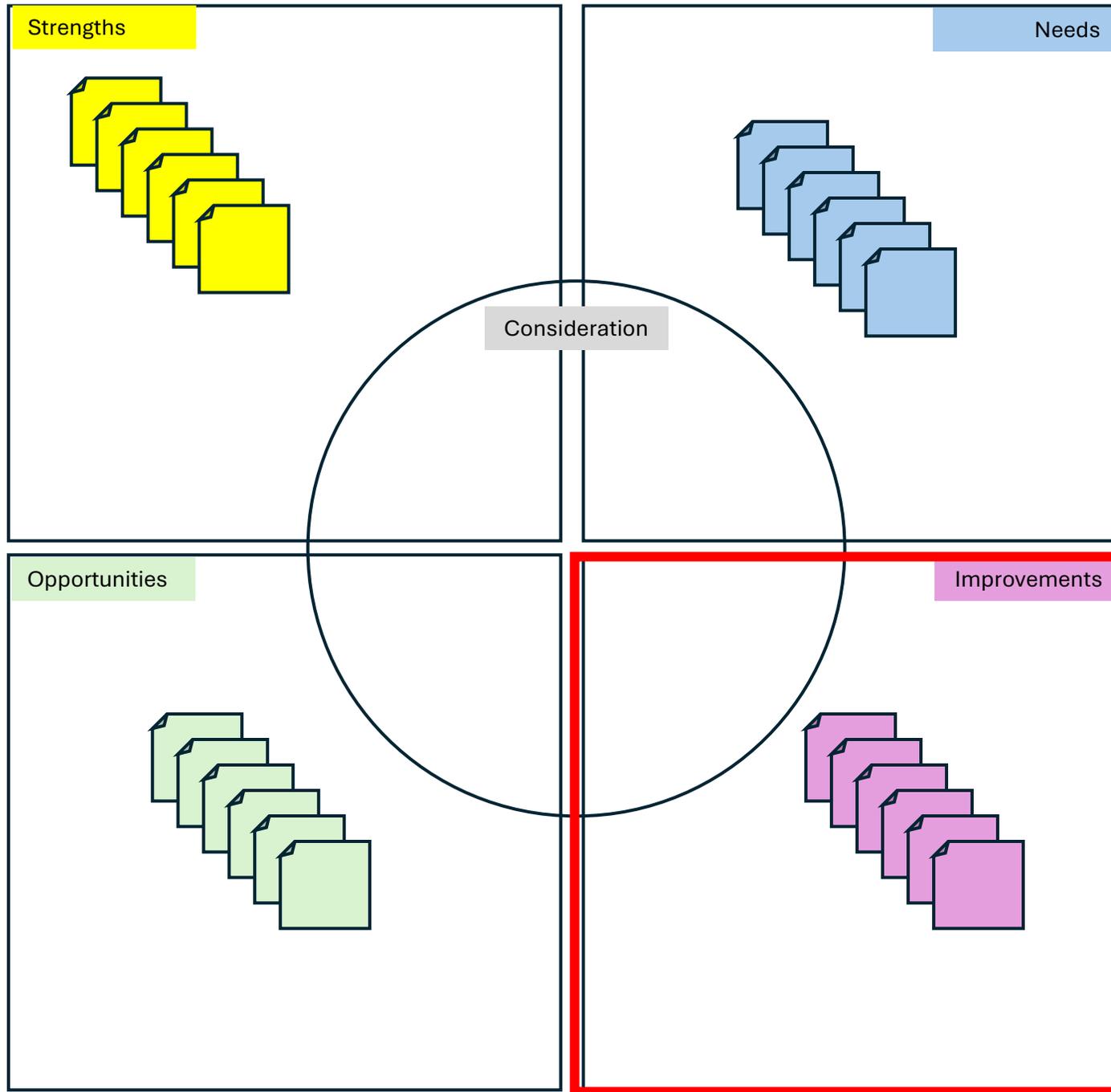
Needs:

Needs are internal factors within our control. These might be resources, materials, processes, organization, people/committees, etc. that you know you need to meet your goals.

- if we had _____ , this would be a better way to [worship, visit, study, host community events, connect with members, achieve this goal,...] OR
- ... [you get the idea...]

Consider organizational needs, team needs, individual needs... for example - needs could be {clarity, additional space, leadership, counseling, knowledge, time/resources, ...}

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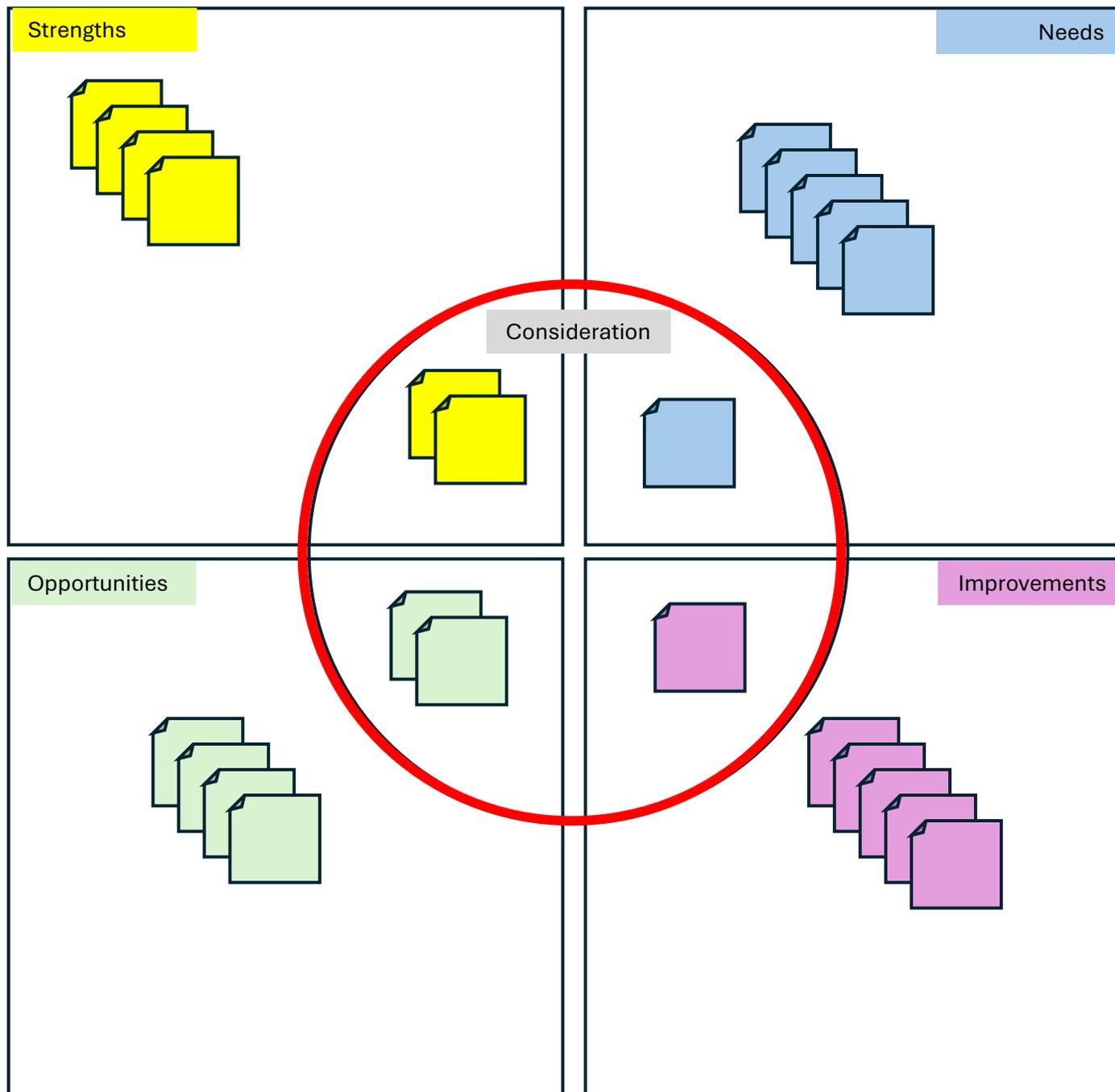
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Improvements:

Improvements are internal and external. They are areas of immediate improvement that could make you better or support progress.

- A consistent area of improvement I hear people wish for is _____
- one area of improvement or (change?) that would support our capacity and capability is _____
- Think beyond your current resources and eliminate any constraints you've had in planning... no bad ideas. Considering and/or prioritizing comes later.

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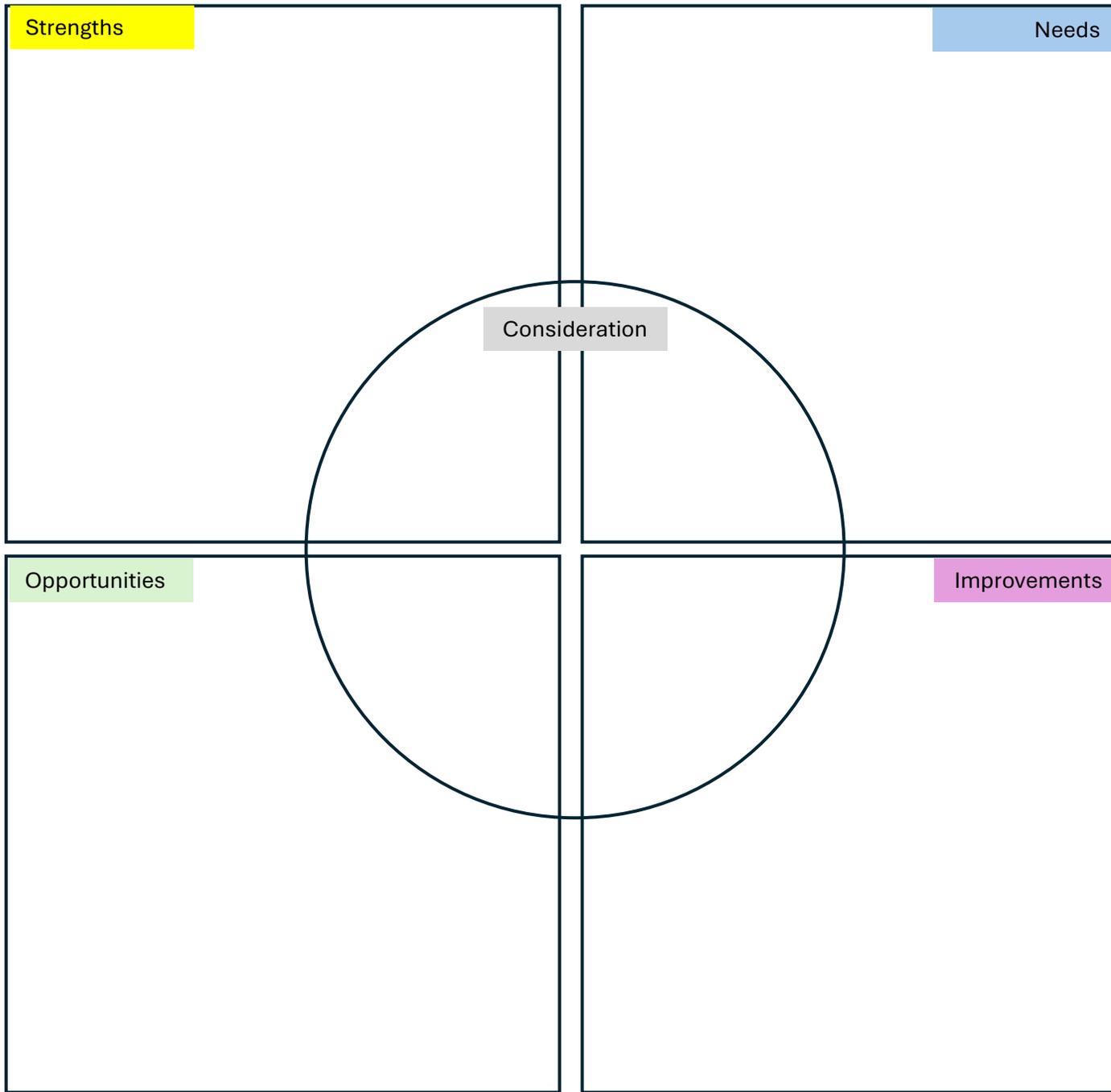


SONIC*- Strengths, Opportunities, Needs, Improvements, Consideration

Consideration:

- What are we doing now, even a little?
- Goal: by listing items/ideas – increase what is working well, decrease what isn't
- What can you accomplish in the next 30-90 days? Next year?
- What gaps do you have in capabilities and/or capacity to achieve and are there skills / talents within the congregation that are not being used?
- What recommendations can you frame into goals?
- What are the priorities? (use mission and values to evaluate)
- What themes emerged?

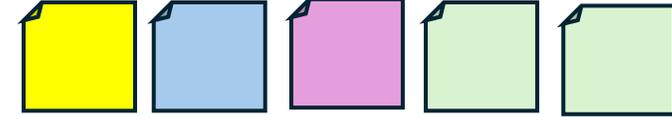
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Look for Themes that emerge from the ideas.

Example:

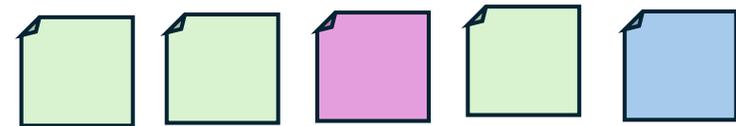
Worship & Facilities:



Christian Education & Discipleship



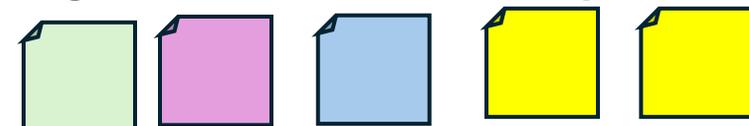
Outreach & Community Engagement



Member Care & Fellowship



Organizational Stewardship



Approach – Methods to Create Project Clarity and Communicate

- Charter

- Description: Short scope and definition of what will be done
- Expected benefits: When we're done, we anticipate this
- People: Who is leading and who are key stakeholders
- Budget: What costs are expected
- Alignment: How does this work support the defined strategic plan objectives
- Scope: in scope and out of scope items
- Timeframe: when will this start, when will it end, what key milestones exist

- Plan Documents

- OKRs
- 3-Horizon
- One Page Project Manager



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GENERAL PROJECT INFORMATION	
Project Name:	
Project Lead:	
Date Submitted:	
PROJECT DETAILS	
PROJECT DESCRIPTION	PURPOSE OR JUSTIFICATION FOR THE PROJECT
PROJECT OBJECTIVES	EXPECTED MEASURABLE BENEFITS
• x	• x •
HIGH LEVEL REQUIREMENTS	KNOWN RISKS OR CONSTRAINTS
• x	• x
STRATEGIC ALIGNMENT	KEY STAKEHOLDERS
<ul style="list-style-type: none"> — Worship & Facilities — Christian Education & Discipleship — Outreach & Community Engagement 	<ul style="list-style-type: none"> — Member Care & Fellowship — Organizational Stewardship
IN SCOPE (What will be addressed)	OUT OF SCOPE (What will not be addressed)
•	• x
WHAT ARE THE CONSEQUENCES OF NOT DOING THIS PROJECT?	
KNOWN COST/BUDGET	TIMEFRAME: IDEAL START AND END

Approach – Methods to Create Project Clarity and Communicate

- Charter

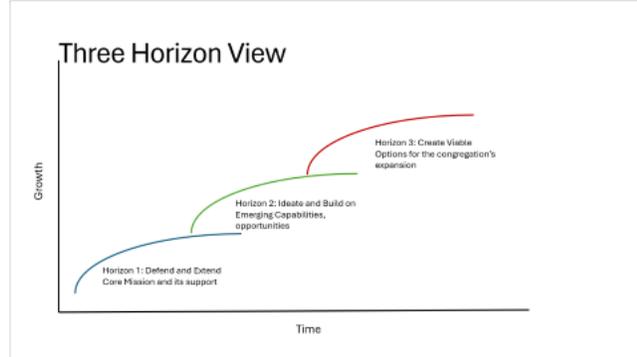
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SMART Goals (OKR Style)

- Objective:** Increase discipleship within the congregation.
- Key Results:**
 - Specific:** Launch a new discipleship program by September 2026.
 - Measurable:** Enroll at least 50 members in the program within the first three months.
 - Achievable:** Train 10 leaders to facilitate discipleship groups.
 - Relevant:** Align the program with the church's mission and values.
 - Time-bound:** Achieve a 20% increase in active participation in discipleship activities by December 2026.



Mission	Examples: To reach more people for Christ and develop them into mature followers of Christ				
Vision	A vibrant congregation known for teaching and living the truth of God's Word, growing in Christ, reaching out with His love to the community, and planting new churches.				
Overall Metrics	Bible Study Attendance, member Sunday attendance, visitor attendance, use of God's gifts				
Goals/Practices	Grow Discipleship	Increase participation	Understand and use gifts	Improve first impressions	Community engagement
Priority Metrics	<ul style="list-style-type: none"> Grow in core group 4-week participation BBC class 	<ul style="list-style-type: none"> Discipleship attendance & participation Discipleship/mentorship 	<ul style="list-style-type: none"> Relationship influence One study member Discipleship 	<ul style="list-style-type: none"> Greater training participation Facilities improvements 	<ul style="list-style-type: none"> Activity/ volunteerism Home Bible study
Priority Strategies	Grow in Knowledge and Understanding <ul style="list-style-type: none"> Launch 3 new adult small group focused on spiritual formation by Q4 Appoint a youth ministry ministry coordinator by Q2 Increase Sunday school and youth program participation by Q4 by Q4 BBC class participation 	Grow in Acts of Service	Grow in Grace of Giving	Excel in Hospitality	Deepen our Connections <ul style="list-style-type: none"> Event 1 Event 2
Proposed 12 Month Initiatives	<ul style="list-style-type: none"> Design study program for... Develop strategy for... Train a 4th discipline for... Develop a new core reach out campaign 	<ul style="list-style-type: none"> Initiative 1 Initiative 2 	<ul style="list-style-type: none"> Initiative 1 Initiative 2 	<ul style="list-style-type: none"> Initiative 1 Initiative 2 	<ul style="list-style-type: none"> Initiative 1 Initiative 2

SMART Goals (OKR Style)

- **Objective:** Increase discipleship within the congregation.
- **Key Results:**
- **Specific:** Launch a new discipleship program by September 2026.
- **Measurable:** Enroll at least 50 members in the program within the first three months.
- **Achievable:** Train 10 leaders to facilitate discipleship groups.
- **Relevant:** Align the program with the church's mission and values.
- **Time-bound:** Achieve a 20% increase in active participation in discipleship activities by December 2026.

Ex: 18-Month Strategic Ministry Plan Statement

Vision: To cultivate a spiritually vibrant, welcoming, and mission-driven church community that nurtures youth and families, strengthens internal discipleship, and extends Christ's love to our neighborhood.

Worship & Facilities

Objective: Enhance worship experience and maintain a safe, welcoming facility.

- KR1: Complete 3 key facility upgrades (e.g., lighting, technology upgrades, child care room) by Q2 2026.
- KR2: Increase worship attendance by 20% through improved environment and engagement.
- KR3: Train 10 new volunteers for worship support (materials, ushers, greeters, tech, music) by Q1 2026.

Christian Education & Discipleship

Objective: Expand and enrich youth and family discipleship programs.

- KR1: Launch a weekly youth and parent (family) Bible study by Jan 2026 with at least 10 regular attendees.
- KR2: Develop youth events and church service programs for calendar year 2026 by December 15 2025

KR3: Recruit and train 4 new youth ministry volunteers by Mar 2026.

Outreach & Community Engagement

Objective: Build meaningful relationships within the community and with neighborhood families.

- KR1: Participate in 6 community events focused on families and children by Mar 2027.
- KR2: Distribute 100 family devotional kits in the neighborhood by Q3 2026.
- KR3: Establish communications and social media strategy by Q4 2025.
- KR4: Recruit and train 3 volunteers for communications and social media updates by Jan 2026.

Strategic Goal: Strengthen youth and family ministry within the congregation, followed by intentional outreach to neighborhood families with children, offering spiritual support and invitations to engage with our church community.

4. Member Care & Fellowship

Objective: Deepen member engagement and spiritual care.

- KR1: Launch a monthly family fellowship night (or small group program) starting Jan 2026.
- KR2: Implement a member care tracking system by Dec 2025.
- KR3: Re-engage 75% of inactive members through personal outreach by June 2026.

5. Organizational Stewardship

Objective: Strengthen leadership, communication, and resource alignment.

- KR1: Finalize and implement role descriptions for all council and elder positions by Nov 2025.
- KR2: Develop a quarterly ministry dashboard to track progress on OKRs by Jan 2026.
- KR3: Identify and invite 25 volunteer to use their talents and time in ministry plan activities through targeted recruitment and training by June 2027.
- KR4: Formally develop and launch a Church Technology Committee by Jan 2026 to manage audio/visual systems and digital service delivery.
- KR5: Create a financial support plan for new investments beyond the current budget, including fundraising strategies and grant opportunities, by Q1 2026

Ex: Operational Plans by Council Area

Evangelism

- Plan and execute one outreach activity per month (e.g., flyer distribution, social media campaign, neighborhood walk, etc.)
- Coordinate with Education and Member Care for follow-up on new contacts
- Track engagement metrics and report to council.

Education

- Maintain weekly Bible classes and Sunday School.
- Review and update curriculum quarterly
- Host quarterly teacher support/training sessions
- Prepare and distribute one family devotional resource every other month

Stewardship

- Monitor monthly budget and expenses.
- Prepare quarterly financial reports for council.
- Organize one stewardship education session per quarter.
- Coordinate annual giving campaign.
- Coordinate offering worship counters and deposits

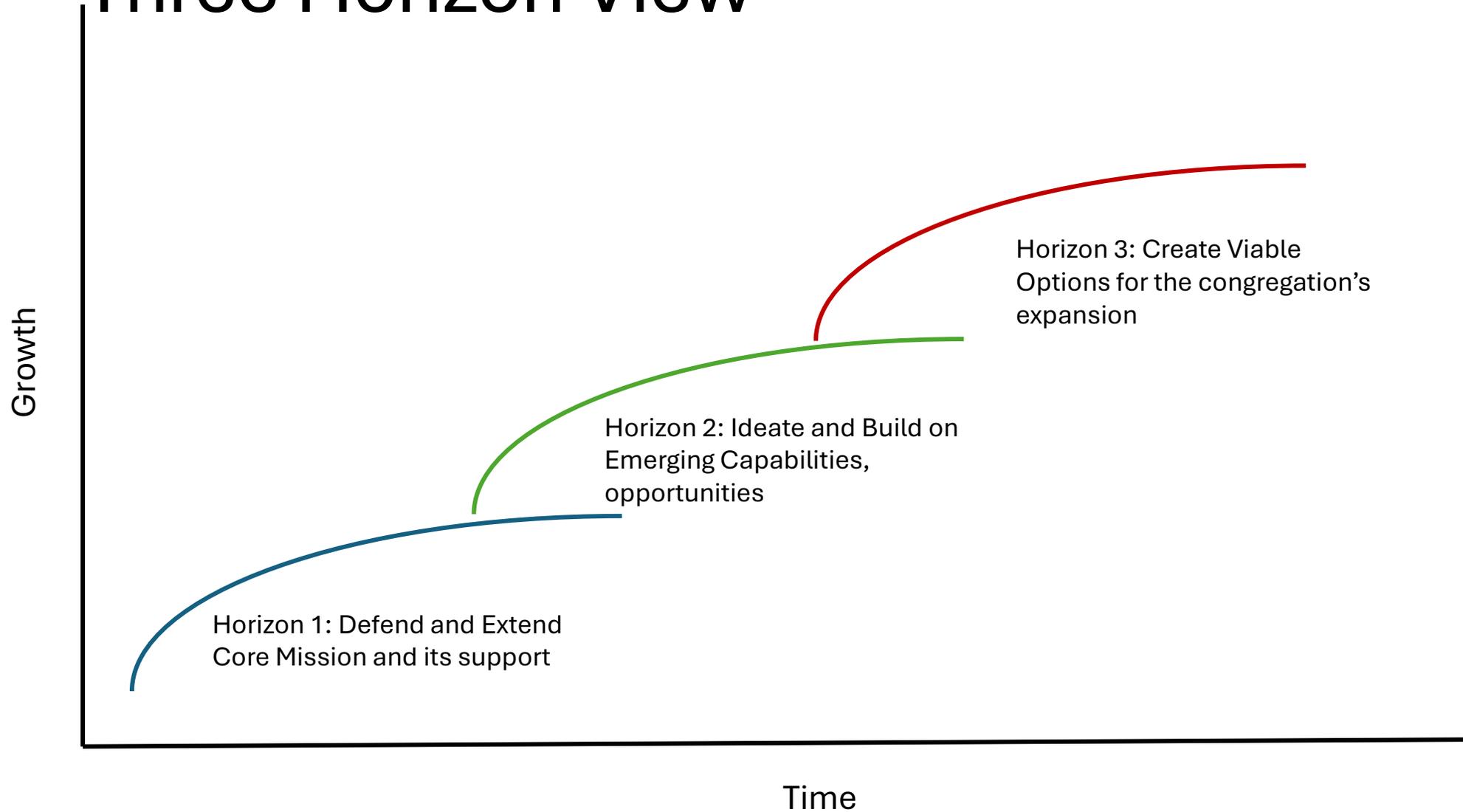
Facilities & Maintenance

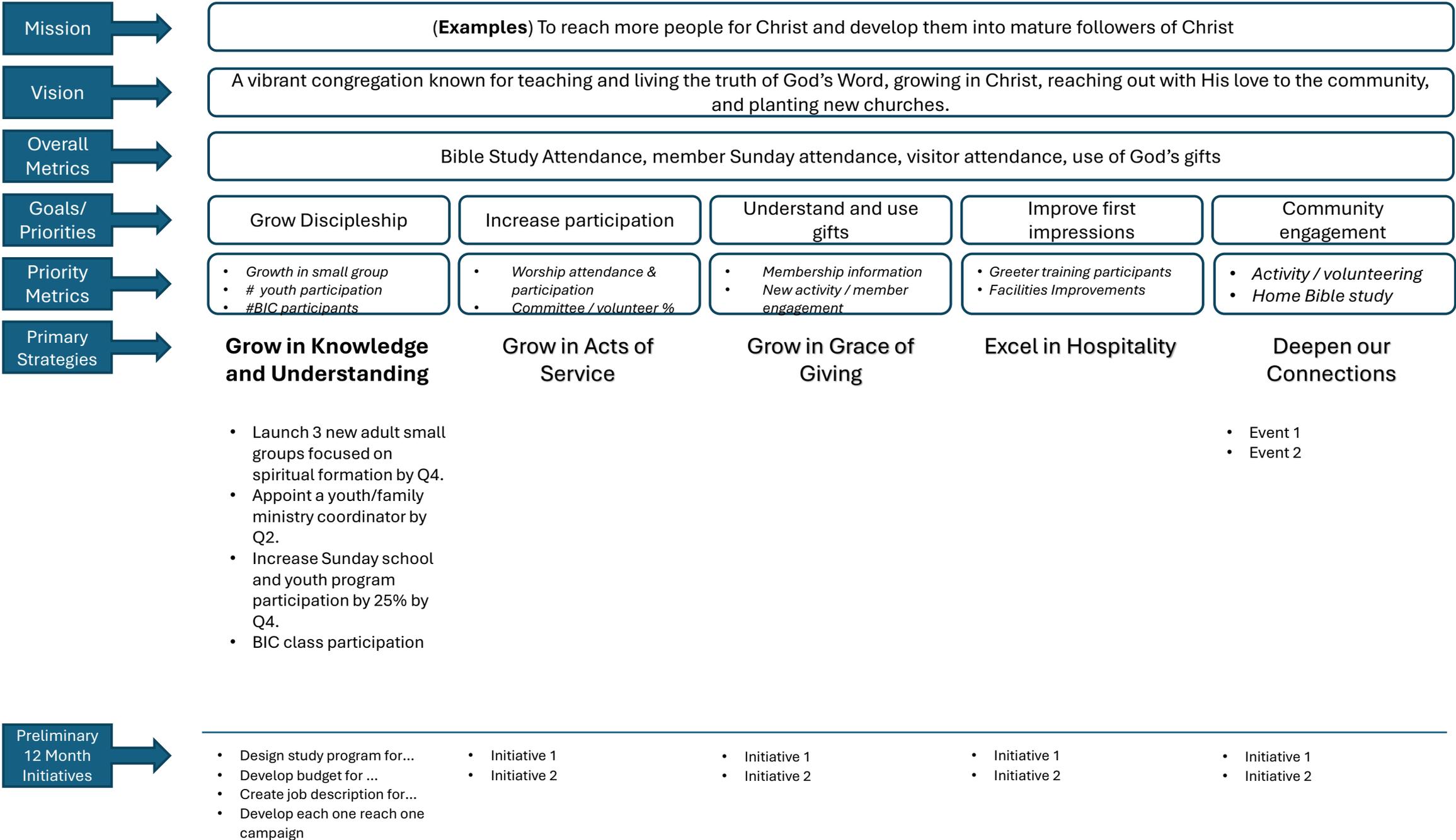
- Conduct monthly facility and grounds inspections.
- Maintain list of weekly facility needs and assigned volunteer or service.
- Schedule routine maintenance tasks (HVAC, cleaning, yard work, safety checks).
- Prioritize and plan for facility upgrades (based on strategic goals).
- Coordinate volunteer workdays quarterly.

Elder Committee

- Hold monthly elder meetings to review member care needs.
- Assign follow-up visits or calls for new and inactive members.
- Support spiritual development through prayer groups and mentoring.
- Collaborate with Education and Evangelism for youth and family support
- Coordinate weekly user and greeter

Three Horizon View







Accountability

- Measures and Metrics
- Roles and Responsibilities



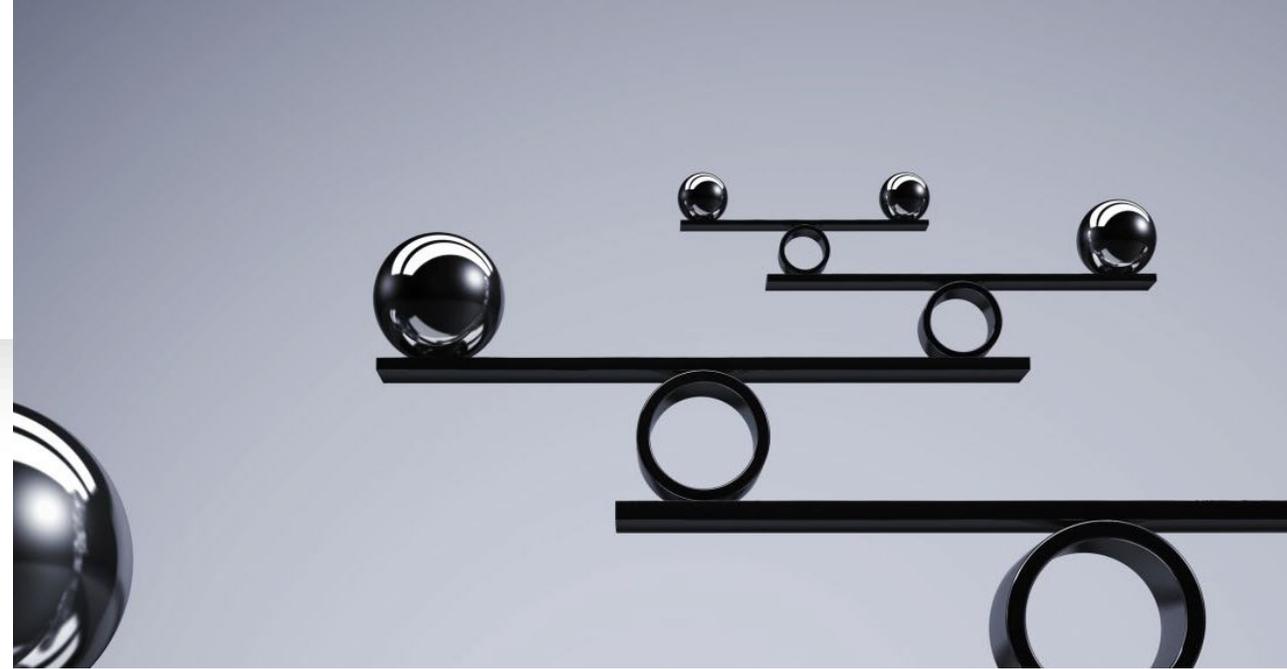
Metrics and Measures

A close-up photograph of a pencil lying diagonally across a document. The document features a line graph with a grid. The y-axis has numerical labels '50' and '100'. The x-axis has year labels '92' and '93'. The pencil is positioned over the graph, with its tip pointing towards the right. The background is softly blurred, showing more of the document and the pencil's body.

- Measure what matters
 - What action can be taken?
 - What trends matter?
- Should come from objectives
 - Where are we now and where do we want to be?
 - How long do we anticipate this taking?
 - What does good look like?

Roles and Responsibilities

- **Clarity prevents confusion**
- **Accountability drives progress**
- **Builds trust and unity**
- **Maximizes Limited Resources**
- **Enables Effective Communication**
- **Encourages Engagement and Ownership**
- **Supports Long-Term Continuity**
- **Respects Stewardship**

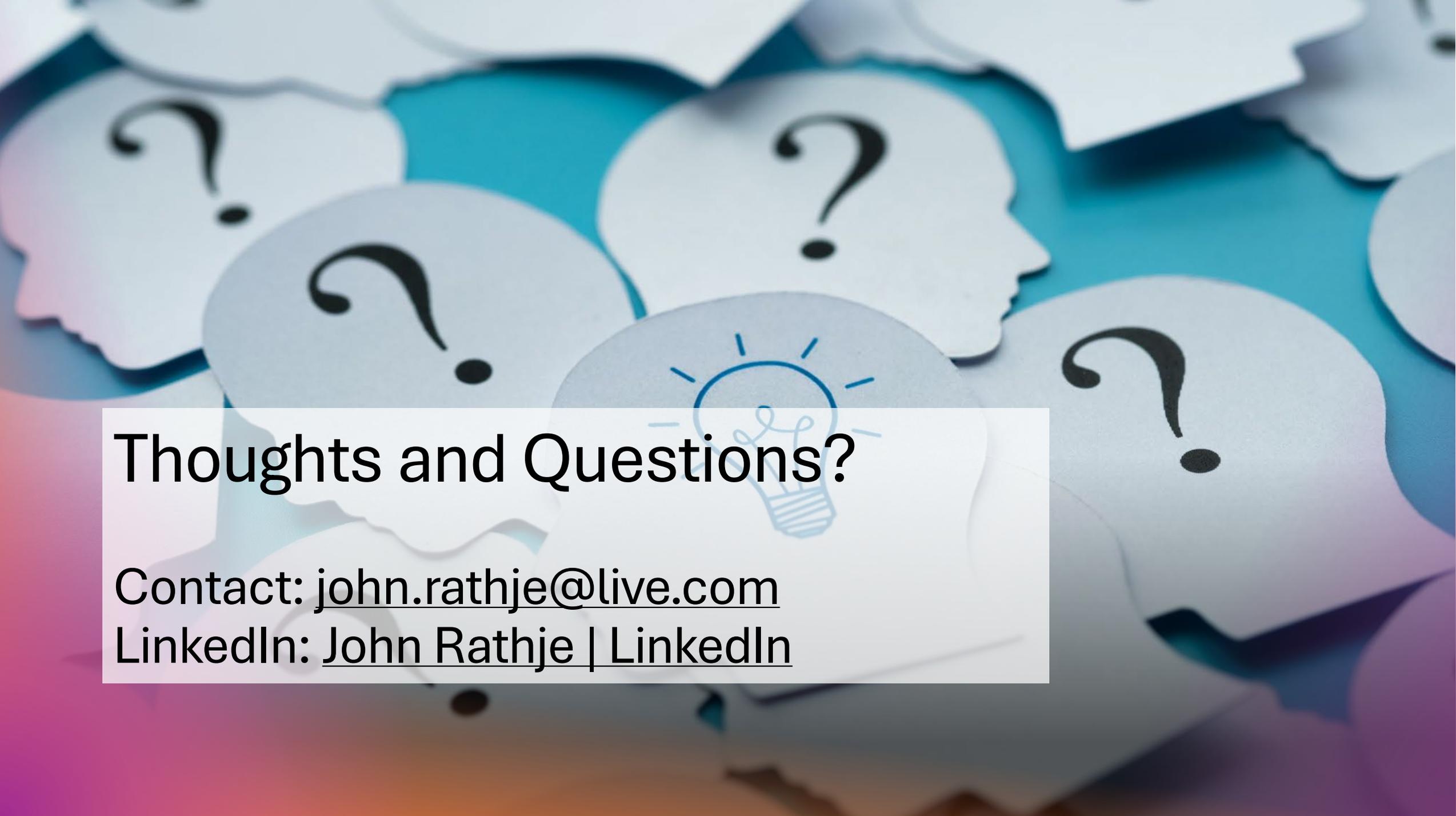


Develop the right balance
between *Ministry Calls* &
Corporate Careers &
Volunteer Capabilities

One last ingredient thought ...

12 Put on then, as God's chosen ones, holy and beloved, compassionate hearts, kindness, humility, meekness, and **patience**, 13 **bearing with one another** and, if one has a complaint against another, **forgiving each other**; as the Lord has forgiven you, so you also must forgive. 14 And above all these **put on love, which binds everything together in perfect harmony**. 15 And let the **peace of Christ rule** in your hearts, to which indeed you were called in one body. And **be thankful**. 16 **Let the word of Christ dwell in you richly**, teaching and admonishing one another in all wisdom, singing psalms and hymns and spiritual songs, with thankfulness in your hearts to God. 17 And whatever you do, in word or deed, ***do everything in the name of the Lord Jesus***, giving thanks to God the Father through him.

Colossians 3:12-17 (ESV)



Thoughts and Questions?

Contact: john.rathje@live.com

LinkedIn: [John Rathje | LinkedIn](#)