

Elements of a Strategic Plan

by Nancy D. Olsen and Howard W. Olsen, Ph.D.

DO YOU KNOW where your church is going? What will your church be like in three years? Will you be a few steps closer to realizing your vision? If you do not change anything, will the future be any different than the past? One sure-fire way to impact your church's future is to dust off an old tool—the Strategic Plan.

No one strategic model fits all organizations, but the planning process includes certain basic elements that all churches can use to explore their vision, goals, and next steps of an effective strategic plan.

WHY DO A STRATEGIC PLAN?

Strategic planning is a process that helps focus on aligning the unique gifts and resources that God has given your organization to take advantage of your opportunities. Scripture says, “*Be very careful, then, how you live—not as unwise but as wise, making the most of every opportunity*” (Ephesians 5:15–16). As you do the planning, let God do the directing.

For the Christian, this is not simply projection-based planning but the realization that through prayer and obedience you can be a catalyst to help bring about a future that is in alignment with God's will. Through prayer, the framework for a plan can be established. We do the planning, but God does the directing.

WHAT IS STRATEGIC PLANNING?

Simply put, a strategic plan is the formalized road map that describes how your organization executes the chosen strategy.

A plan spells out where an organization is going over the next year or more and how it is going to get there. A strategic plan is a management tool that serves the purpose of helping an organization do a better job, and it improves organizations because a plan focuses the energy, resources, and time of everyone in the organization in the same direction.

Strategic planning does not have to be mysterious, complicated, or time-consuming. In fact, it should be quick, simple, and easily executed. Additionally, strategic planning is not just something you cross off your list of “to-dos”—you must create a culture of strategic thinking, so your strategic planning does not become an annual retreat but, instead, a part of daily decision making.

A good strategic plan achieves the following:

- Reflects the values of the organization.
- Clearly defines what is most important for achieving success.
- Assists everyone in daily decision making.
- Gets everyone on the same page, focused and pulling in the same direction.
- Creates a culture of strategic thinking and a part of daily decision making.

WHAT ARE THE ELEMENTS OF A STRATEGIC PLAN?

There are several different components or pieces in a strategic plan. The typical questions people have relating to the elements are the following:

- What is the difference between mission and vision?
- Which comes first—objectives or goals?
- How do they work together?

This is probably the most widely debated part of strategic planning. Every person you ask will provide a different answer. Ignore the semantics and focus on establishing a framework. What matters is having a combination of long-term and short-term markers to keep your church moving in the right direction.

Think of the elements of a typical strategic plan in the hierarchy as outlined in Figure 1:

- **Mission**—To define the organization's purpose. Why do we exist?
- **Values**—To clarify what you stand for and believe in.
- **SWOT**—To assess the particular strengths, weaknesses, opportunities and threats that are strategically important to your church. (SWOT is a filtering tool to assess where you are now.)
- **Advantage**—To define what you do best. What do you do best?
- **Vision**—To explain where you are headed. Where do we want to be in five years?
- **Organization-wide Strategy**—How will you get to your vision? What is the route you will take?

Elements of Your Strategy Figure 1

Mission/Core Purpose

The underlying “why” you are climbing the mountain, why do you exist?

Core Values/Beliefs

Enduring core beliefs to adhere to no matter what mountain you climb.

Vision (5–10 year)

The specific mountain you are currently trying to climb – the “where.”

Organization-Wide Strategies

The route you intend to take and the general methods you intend to use to reach the top of that specific mountain.

Strategic Objectives/Priorities (3–5 year)

Intermediate objectives to the top of the mountain. If you have a 5-year vision, these would be three- to four-year intermediate mileposts on the way up the mountain.

Goals (1–3 year) and Actions

Specific methods for climbing the sections of rock and ice that confront you right now. These would be analogous to detailed annual plans for getting things done this year on the way to the five-year vision.

Adapted from Jim Collins

- **Objectives**—To connect your mission to your vision. What are the long-term, 3-year out strategic priorities you need to perform in order to achieve your vision?
- **Goals**—To set goals that convert the strategic objectives into specific performance targets. What are the one-year goals you are trying to achieve to support your objectives?
- **Action**—To set specific action plans that lead to implementing your goals. What are the 30, 60, 90 days actions?
- **Scorecard**—To measure and manage your strategic plan. What are the key performance measures you can track in order to monitor if you are achieving your goals?

HOW DO THE ELEMENTS FIT TOGETHER?

Because it is easy to confuse how all the elements of a plan come together and where they go, the visual Strategy Map in Figure

2 is a simple, yet clear way of looking at the whole plan. (see pages 26–27) By placing all the elements of the plan into three areas, you can clearly see how the pieces fit together. Each area has certain components of the plan. The three areas are

- Where are we now?
- Where are we going?
- How will we get there?

WHERE ARE WE NOW?

As you think about where your organization is now, you want to look at your foundational elements (mission and values) to make sure there has not been a change. More than likely, you will not revise these two areas very often. Then you want to look at your current strategic position, which is where you look at what is happening internally and externally to determine how you need to shift and change. Here are your foundational elements:

Mission

Mission defines your purpose—the purpose for which you were founded and

why you exist. A mission statement states what the church organization intends to accomplish and the needs it is endeavoring to serve. It also serves as a guide for day-to-day operations and as the foundation for future decision-making.

To create a mission statement you need to understand how God has uniquely gifted your church with core strengths, abilities, and gifts. You need to embrace your church's uniqueness and develop plans around it. With this in mind, your mission statement will be one that expresses God's call on your church—focusing on who you are and what you do.

To write a mission ask the following questions:

- Why do we exist?
- What is God's purpose for our church?
- How can we, with limited resources, really make a difference?

Examples:

- To gather to worship and become empowered to serve.
- To be an oasis of faith at a busy crossroad.
- To help our community experience Jesus in a real and relevant way.
- To build an overcoming church out of broken lives through the power of Jesus.
- To exalt the Lord, equip the believer, evangelize the world, and expand the Kingdom.
- To present authentic Christianity to our families, community, country and world.

Values

Values are enduring, passionate, and distinctive core beliefs. They are guiding principles that never change. Values are why we do what we do and what we stand for. They are beliefs that guide the conduct, activities, and goals of the organization. Values are deeply held convictions, priorities, and underlying assumptions which influence our attitudes and behaviors. They have intrinsic value and impor-

tance to those inside the organization. Your core values are part of your strategic foundation.

A church's values can dominate the kind of strategic direction it considers or rejects. When values and beliefs are deeply ingrained and widely shared by pastors, board and staff, they become a way of life within the church and they mold church strategy.

To write values ask the following questions:

- What are the core values and beliefs of our organization?
- What values and beliefs guide our daily interactions?
- What is our church really committed to?

Examples:

- **Family**—We believe there is nothing more important than strong united families.

A Godly vision is based on God's will for the church. It is a picture of seeking the needs of other people and meeting those needs. It is vitally connected to the heart of God and His perspective.

- **Excellence**—We believe excellence honors God and inspires greatness.
- **Equipping**—We believe in equipping the saints for ministry and life by helping them to operate in their spiritual gifts.
- **Prayer**—We believe in the power of prayer, and that makes a critical difference in all we attempt to achieve. We are to be a house of prayer for all nations.
- **Authenticity**—through authentic living, biblical authority, worship, prayer, and spirit.

- **Committed community**—through intimacy within the community, servant leadership, genuine relationships, and beauty in diversity.

SWOT (Strategic Position)

The SWOT (Strengths, Weaknesses, Opportunities, Threats) is a tool to help match internal organizational strengths with external opportunities to meet the needs of your constituents and community best. Think of the SWOT as a filtering tool to assess your current strategic position. A good understanding of your strengths and weaknesses, your opportunities, and the external threats is essential to the assessment.

(Continued on page 28)

Summary

- One sure-fire way to impact your church's future is to dust off an old tool—the Strategic Plan.
- No one strategic model fits all organizations, but the planning process includes certain basic elements that all churches can use for next steps of an effective strategic plan.
- Strategic planning is a process that helps focus on aligning the unique gifts and resources that God has given your organization to take advantage of your opportunities.
- A strategic plan is the formalized road map that describes how your organization executes the chosen strategy.
- There are several different components or pieces in a strategic plan which are discussed in this article.
- Strategic planning needs include setting goals to build on your church's strengths; shore up the weaknesses; capitalize on the opportunities; and recognize the threats.
- Forming a strategic vision should provide long-term direction and infuse the church with a sense of purposeful action.
- Strategic objectives state the broad direction and goals and work towards converting your mission into actions that will accomplish your vision and help sustain your unique advantage.
- Strategy establishes a way to match your church's strengths with opportunities so that your church comes to mind when people have a need.

- Communicate the plan to everyone in your organization. A strategic plan is a living, dynamic document. Strategic planning is about keeping the plan active so that it does not gather that proverbial dust.

Authors

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Where are we now?

Foundation

Our Mission

Our mission is to present authentic Christianity to our families, community, country, and world

Our Core Values

- Family—We believe there is nothing more important than strong united families.
- Excellence—We believe excellence honors God and inspires greatness.
- Relationships—We believe that loving relationships should permeate every aspect of church life.
- Equipping—We believe in equipping the saints for ministry and life by helping them to operate in their spiritual gifts.
- Devotion—We believe that full devotion to Christ and His cause are normal for every believer.
- Sound Doctrine—We believe that teaching and doctrine should be balanced on the historical roots of Christianity that shaped the theology and orthodoxy of faith. Sound doctrine is held in high esteem.
- Prayer—We believe in the power of prayer, and that it makes a critical difference in all we attempt to achieve.
- Character—We believe that character is more important than talent.
- Evangelism—We believe that an effective church services its community and treats everyone with love, respect, and dignity.
- Worship—We believe that full devotion to Christ and His cause are normal for every believer.

Unique Advantage

What we do best

- We are young minded, progressive and culturally relevant messengers of the Gospel.
- Resources to serve the spiritual needs in our community
- Mature and trained leaders

Organization-wide Strategies

How we will get there

- Year one—Training leaders
- Year two—Growing ministry teams
- Year three—Community penetration

How are we going to get there?

Strategic Objectives and Goals

Mission/Financial—How will we accomplish our mission?

Mission: To stay focused on money to ministry.

- To spend 10% of our budget on evangelism by the end of the year

Revenue Generation: To increase funds from giving.

- To average \$25K a week in tithes and offerings by 12/31/YYYY

Constituents—How we provide value

Current services: Provide excellent service in all family areas.

Busters and Generation X—Ages 35–44

- To provide excellence in family ministry education classes by 12/YYYY
- Add more small groups this year
- Increase church-wide social activities this year

Current constituents: Increase the involvement in small groups.

New Millenium Generation—Ages 25–34

- To provide excellence in the area of media by expanding and enhancing technology by 3/31/YYYY
- Classrooms to be computer capable by 12/31/YYYY

Operational—Which processes we must excel at

Facilities: To provide adequate facilities and maintain property.

- To prepare our current building for sale in Spring YYYY
- To determine needs and develop plan for new facility by 6/30/YYYY

Administrative Management: To improve office efficiency.

- To hire office manager and assistant by 11/YYYY
- To hire a new staff member with an anointing in the area of music and fine arts by 11/31/YYYY
- To develop an accurate YYYY budget that we follow and monitor

People—How we must learn and improve

Leadership: Create a leadership culture.

- Train leaders in Level One by 3/31/YYYY
- To provide a training program for all levels of leadership
- Train leaders in Level Two by 6/30/YYYY
- Train leaders in Level Three by 10/31/YYYY

Staff Development: Learn and adopt best practices.

- Have each pastor attend one best practice church conference each year starting in YYYY

Where are we going?

Scorecard

How we measure success

Measure	Target
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Operational Efficiency: To be financially stable.

- To have \$25K in a savings account by 12/YYYY
- To make weekly church payments in order to cut interest and add to the principle

New Constituents: Increase numbers of members in all groups.

Baby Boomers—Ages 45–55

- Plan special activities with emphasis on them by 9/30/YYYY
- Develop communication tool by 2/YYYY

Ministry Management: To develop programs so they can be run by members.

- To develop our missions program for extensive international outreaches by 12/31/YYYY

Communications Management: To maintain database management and all communications.

- To have a monthly online newsletter by 9/28/YYYY
- To purchase a church management system by 12/YYYY

Culture: Be the most creative and culturally relevant church around.

- To push evangelism envelope by studying the most progressive churches in America by 12/YYYY
- To attend 3 new churches that are progressive by 9/YYYY
- Take all elders to 1 progressive church by 1/YYYY

Vision

What our church will look like

To be the premier charismatic, seeker driven, community church in the state.

Scorecard

How we make strategy a habit

(Continued from page 24)

The SWOT is only as good as the information it contains. Gathering information from your constituents and stakeholders about the effectiveness of your programs, services, and church is essential for the SWOT to identify key issues. The purpose of a SWOT is to help produce a good fit between your church's internal resources and capabilities and your external environment.

When you plan you will need to set goals to build on your church's strengths, shore up the weaknesses, capitalize on the opportunities, and recognize the threats.

Assess your strengths and weaknesses by answering these questions: what do we do well, and where could we improve?

Assess your opportunities and threats by asking what opportunities should we take advantage of and are there any emerging trends that might affect our organization?

Unique Advantage

Just what is a unique advantage? It is simply the answer to "what does your church do *best*?" Your unique advantage is what your church does or *potentially* could do better than similar organizations. The result of a well-developed and executed strategic plan is to develop a unique advantage. It is what you do best that draws constituents/stakeholders to use your programs and services instead of similar organizations. Successful churches deliberately make choices to be unique and different in activities that they are really, really good at doing and they focus all of their energy in these areas.

Your unique advantages are the foundation, the cornerstone of your strategic plan. Throughout the planning process you will need to evaluate every part of your plan to determine whether it supports or detracts from this.

To identify your unique advantages ask the following questions:

Resources

Strategic Planning Online System:

MyChurchPlan.com is a Web-based system strategic planning system. Through a self-guided, step-by-step, cost-effective process, a church can quickly and efficiently build, monitor, and revise their growth plans as God directs. MyChurchPlan will assist a church in developing a strategic plan, creating professional reports without having to recreate the wheel every time, and implementing the plan. It will save the church valuable time, create a plan that is dynamic and easily editable, produce professional reports, and increase performance through execution.

Books:

Nancy D. Olsen and Howard W. Olsen, Ph.D. *Strategic Planning Made Easy™ for Nonprofit Organizations: A Practical Guide, 2007.*

This book is designed to help executive directors and their boards build and execute their strategy through a cost-effective, self-guided process, leading to effectively fulfilling the organization's purpose. Through thought provoking questions, relevant examples and worksheets, the book guides nonprofits through the planning process. The One-Page Strategic Map helps you visualize the plan.

Erica Olsen. *Strategic Planning For Dummies, November 2005*

Strategic Planning For Dummies brings you everything you need for the next phase of church growth. Learn how to build and sustain your competitive advantage, develop a vision for you and your organization, set up an ongoing process for market assessment, develop an integrated strategy, monitor with a scorecard and make strategy a habit.

- What does your church do best?
- What can your organization potentially do better than any other organization?
- What unique skills, resources, gifts and capabilities has God placed in your church?

Examples:

- We are young-minded, progressive and culturally relevant messengers of the Gospel of Christ.
- We have a prime location.
- We have Bible-based preaching.
- We are a church of small home groups.
- We have an extensive care ministry.
- We have a strong youth ministry.

WHERE ARE WE GOING?

The elements of the question, "Where are we going?" help you answer other questions, such as, What will my church look like in the future? Where are we headed? What is the future I want to create for my church? The following elements help you define the future for your church:

Vision

A vision is a picture of what your church's future makeup will be and where the organization is headed. Vision provides a clear mental picture, by faith, of what your church will look like in five to ten years from now. Forming a strategic vision should provide long-term direction, delineate the organizational activities to be pursued, the capabilities it plans to develop, and infuse the church with a sense of purposeful action. It serves as a unifying focal point for everyone in the organization like a North Star. It delineates the future focus and where the church is going.

A Godly vision is based on God's will for the church. It is a picture of seeking the needs of other people and meeting those needs. It is vitally connected to the heart of God and His perspective. A vision which is inspired by God is God-sized and will require the power of God to fulfill. A Godly vision makes your heart surge, carries you to heights you never dreamed possible,

and causes exponential growth. You are empowered and motivated by it. It seizes hold of you and orders your thoughts and actions. Scripture says, *“Record the vision and inscribe it on tablets, that the one who reads it may run.”* (Habakkuk 2:2)

To write a vision, pray and seek God’s wisdom by asking the following questions:

- What will our church look like ten years from now?
- Where is God directing our church?
- What is God’s vision for our church?

Examples:

- To be an interdenominational, cell-based, multi-congregational church of believers in our community who practice authentic Christian community.
- To be a place where people searching to know God are welcomed and taught Biblical principles and relevant Christian community.

- To develop a loving and caring Christian community effecting a global impact for Christ through its local, regional, and international outreach.
- To be the premier seeker-driven, community church in the state.
- To become a premier multi-cultural, soul winning, disciple-making church in the area, renowned worldwide for our commitment to missions and our passion for excellence, service, and team work.

HOW WILL WE GET THERE?

Knowing how you will reach your vision is the meat of your strategic plan, but it is also the most time consuming. The reason it takes so much time to develop is because there are a number of routes from your current position to your vision. Picking the right one determines how quickly or slowly you get to your final destination. The parts of your plan that lay out your roadmap are as follows:

Strategic Objectives/Priorities

Strategic objectives are long-term, continuous strategic areas that get you moving from your mission to achieving your vision. Objectives explain *how* you will get there. In other words, objectives are long-term (3–5 years) general areas that state how your organization will get from its mission (where you are now) to its vision (where you are going).

Objectives are also called strategic priorities, initiatives, and cornerstones. It is helpful to think of objectives as broad general area. Objectives state the broad direction; goals then operationalize that direction. They are the continuous strategic activities necessary to achieve your vision. They define what your organization is intending to accomplish both programmatically and organizationally. Objectives work towards converting your mission into actions that will accomplish your vision and help sustain your unique advantage.

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An administrator devoted to the successful implementation of the plan is key. The plan needs to be supported with people, money, time, systems, and, above all, communication.

To write objectives ask these questions:

- What are the key activities that you need to perform in order to achieve your vision?
- What areas do we need to focus on over the next 3–5 years to accomplish our vision?

Examples:

- To impact strategically more lives each year.
- To manage our church on a fiscally sound operating basis.
- Expand programs/services to existing congregation.
- To serve more people in the community through new programs and services.
- To improve internal process continually to realize efficiencies.
- To improve internal communications.
- To develop the leadership abilities and potential of our staff.

Strategy

Strategy establishes a way to match your church's strengths with opportunities so that your church comes to mind when people have a need. A strategy is like an umbrella. It is a general statement(s) that guides and covers a set of activities. You can develop one strategy for your church or guiding statement for each year. Strategy answers the question "how." It explains how you will travel to your final destination.

Consider listing the top one to two strategies or long-term activities your church needs to pursue in order to achieve its vision by asking how will we achieve our vision and how can we best match our strengths in a way that provides value and is perceived by our constituents?

Examples:

- Overall—Number of lives changed
- 1st year—Birth of the church
- 2nd year—Leadership development
- 3rd year—Growth
- 4th year—Discipleship
- 5th year—Community outreach
- 6th year—International outreach

Goals convert your strategic objectives into specific performance targets. Effective SMART goals clearly state what you want to accomplish, when you want to accomplish it, how you are going to do it, and who is going to be responsible. Each goal should be specific and measurable. With short-term goals, the organization converts the mission, vision, and long-term objectives into performance targets. Realistic goals ought to serve as a tool for stretching an organization to reach its full potential.

It is important for the church to view goals as motivational targets, and exciting, measurable milestones for the future. Think about achieving them in a 12–18 month timeframe. Write goals to build your unique advantage. Additionally, use your SWOT analysis to write goals. Match your strengths with opportunities, shore up your weaknesses and guard against threats.

Goals can be difficult to set because they should be faith-stretching without being presumptuous.

Goals ought to serve as a tool for stretching a church to reach its full potential. This means setting them high enough to be challenging to energize the organization and its strategy. Prayerfully seek God's guidance in setting faith goals. Let God

give you things He wants you to do. Hold your plans before the Lord.

The following is an explanation of the criteria for SMART goals:

- **Specific**—Goals must answer the questions: How much? What kind of performance is to be accomplished?
- **Measurable**—Goals must be stated in measurable or quantifiable terms: Can we measure this goal? How will we know if we achieved this goal?
- **Aggressive yet Achievable**—Is the goal aggressive yet achievable? Goals must provide a stretch that inspires people to aim higher. Set goals you know you can realistically achieve.
- **Relevant/Realistic**—Is the goal relevant to achieving the objective? Goals must maintain consistency and focus.
- **Time Specific**—Is the goal time specific? Goals must answer the question, "by when is it to be accomplished?"

Write goals by asking these questions:

- What are the 1– to 3–year goals we are trying to achieve to support our strategic objective?
- What are your specific, measurable, and realistic targets of accomplishment?

Action Items

Action items are plans that set specific actions that lead to implementing your goals. Action items are basically a "To-Do List" for each goal. It involves listing out the concrete steps that you need to accomplish in order to achieve your goals. An action plan explains who is going to do what, by when, and in what order for the church to reach its goals. The design and implementation of the action planning depend on the nature and needs of the organization.

To ensure implementation of action items, it is important to assign responsibilities and deadlines. A great method to

get buy-in from your stakeholders is to assign each goal to a board member, staff, or volunteer. Ask him/her to write the action plan and be responsible for making sure each task is accomplished. Another method is to identify all the actions that need to occur in the next ninety days. You can continue this same process every ninety-day increment until the goal is achieved.

To write action items ask, "What are we going to do in the next 90, 60, 30 days to work towards this goal?"

Scorecard

To help monitor your strategic plan, one of the best tools around is the Balanced Scorecard developed by Kaplan and Norton from Harvard. The scorecard is to be used as both a measurement and management tool to assist in fulfilling an organization's vision. With it, you can actively track progress towards your goals.

For each goal put a measurement and target on a scorecard (in Excel). With the scorecard, you can actively track your progress on a monthly basis. To begin using the scorecard, select the "Top Five" key goals that you want to measure that will have the most impact in moving your church forward.

To develop a scorecard ask, "what are the key performance measures you can track in order to monitor if you are achieving your goals?"

Execution

Implementation is the most difficult part of the planning process: it is actually achieving the goals set out in the plan while remaining alert and flexible to new opportunities as they unfold. The overall aim is integrating the strategic planning with daily, weekly, and monthly routines. It is good to remember that a plan that is well-implemented brings Godly success to the church.

An administrator devoted to the successful implementation of the plan is key. The plan needs to be supported with people, money, time, systems, and, above all, communication. Communicate the plan to everyone in your organization. Hold a monthly or quarterly strategy meeting to report on the progress toward achieving the goals. Take corrective actions as needed. Above all, remember that implementing the plan requires continued daily prayer for direction accompanied by obedient action in response to what God reveals.

CONCLUSION

A strategic plan is a living, dynamic document. It drives your church and must be integrated into every fiber of your organization, so all staff is helping to move the church in the same direction. All the best missions and strategies in the world are a waste of time if they are not implemented. To be truly successful, the plan cannot gather dust on the bookshelf. You know what "shelf" we are talking about.

Strategic planning is about keeping the plan active so that it does not gather that proverbial dust. Know what your end result looks like and where your milestones should be. Plan your near-term actions and evaluate your progress each quarter. Are you where you thought you would be if you had been on target? Or, if you are off target, how far are you off? The course correction to put you back on track becomes your next action plan. When your church has a clear plan and acts according to the plan, you are going to go from where you are to where you want to go, therefore, ensuring your success! 



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