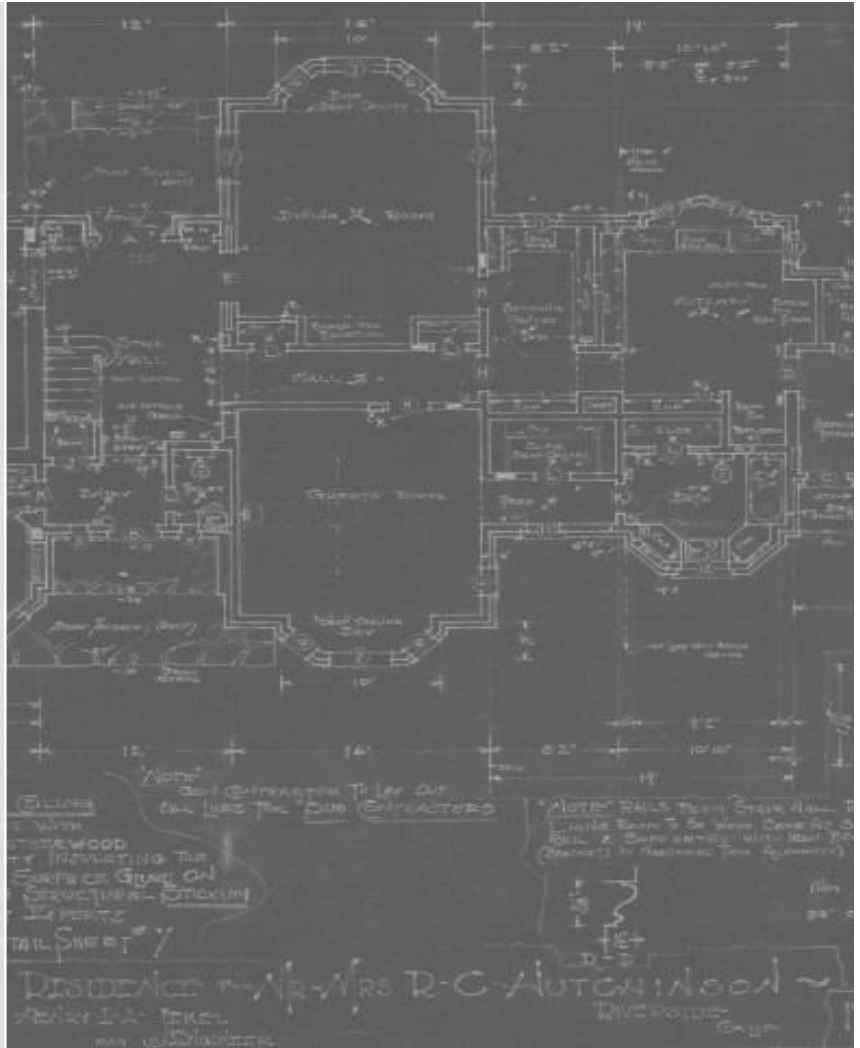


Strategic Planning

David K. Popham

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*The nicest thing about not planning
is that failure comes as a complete surprise,
rather than being preceded by a period of
worry and depression.*

~ John Harvey-Jones

Rocky Mountain Conference, UCC
303-984-9118 or 800-284-0287
david@rmcucc.org

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Strategic Planning

Strategic Planning means using a deliberative approach to producing foundational decisions and actions that shape and guide what a congregation is (identity), what it does (purpose), and why it does what it does (values). The focus of Strategic Planning is on achieving the best fit between a congregation and its community.

Three key dynamics lay at the heart of Strategic Planning: 1) the raising and resolving of critical issues facing a congregation through 2) the design and use of settings of deliberation for the purpose of 3) creating public value.

RAISING AND RESOLVING CRITICAL ISSUES

The goal of Strategic Planning is to position a congregation so that it is aware of the societal and community trends which will effect it in critical ways in order for the responses to these trends to be well reasoned and ensure ecological viability.

For any community of faith ecological viability is the discernment of where God is at work in the congregation, why God is involved in this work, and how to join God in this work. Such discernment aligns a congregation's identity, purpose, and values.

Seeking to respond faithfully to critical trends Strategic Planning is a process which deliberately disrupts the current routines of the faith community. Strategic Planning will also disrupt the "treaties" negotiated among congregants which formed the coalition strong enough to govern the present church expression.

Strategic Planning raises these questions:



- Who are we?
- What problems do we exist to address?
- What do we do to recognize, anticipate, and respond to these needs or problems?
- How should we respond to our key stakeholders?
- What are our philosophy/theology, values, and culture?
- What make us distinctive or unique?

DESIGNING AND USING SETTINGS OF DELIBERATIONS

Forums or small groups are the basic settings we use to create shared meaning through dialogue and deliberation. It is in forums that we develop a shared understanding about what the congregation is, what it does, and why it does what it does.

A step up from the forum is the arena which is a gathering of the larger whole (such as the church council bringing an action item before the full church membership). Arenas may also be simply a larger, informal decision making body. The Strategic Planning process should be designed so that the work accomplished in forums can constructively influence decisions in arenas.

Deliberations create choices from which those participating can exercise judgment and a certain positive control of the congregation's future.

- To succeed deliberative processes must have the support of the congregational leadership and stakeholders.

- Good deliberations are informed by:
 - Information gathering, analysis, and synthesis
 - Clarification of mission and goals to be pursued, and issues to be addressed along the way.
 - Development and exploration of, and choice among, valid alternatives.
 - An emphasis on future implications of present decisions.

By using a deliberative, disciplined process strategic thinking, acting, and learning are joined for the ultimate benefit of those involved and affected.

CREATING PUBLIC VALUE

Public Value provides the external justification for a congregation to exist. A church creates *Public Value* by engaging in ministries which enhance personal and community well being (salvation) at a reasonable cost (ecology). When a local congregation cannot show how it creates *Public Value* by living out its mandates, theology/philosophy, values, and mission it runs the risk of losing its external justification and legitimacy. The congregation that provides ministries which connect to real issues and continues to find ways to do so as circumstances change, typically thrives in its community.

Creating lasting *Public Value* requires that the benefits of what a church does and does not do significantly outweigh the cost of doing and not doing. For example, the cost of the recent sex scandals lowered the *Public Value* of the Church for the pain caused to individuals in terms of broken lives far outweighs the cost of the Church turning a blind eye and doing nothing about abuse in its midst.

Leadership Roles

Leaders become effective – if not visionary – when they play a vital role in interpreting current reality, fostering a collective group mission, articulating strategies, and shaping a collective sense of the future. In short leaders are “truth-tellers” or “direction-givers.” They help people make sense of experience by helping to answer the questions:

- What’s going on here?
- Where are we heading?
- What traditions should be preserved?
- How will things look when we get there?



There is a difference between leaders and leadership as they are not the same thing. Many congregants will take on leader and follower roles at different times during the process of *Strategic Planning*. Whereas leaders are truth-tellers and direction-givers, leadership is “The inspiration and mobilization of others to undertake collective action in pursuit of the common good” (B.C. Crosby and J.M. Bryson). A sense of humor, supportive networks, and balance are important for the persistence and resilience needed to cope with the ups and downs of *Strategic Planning*.

SPONSORS

Typically *Sponsors* are top positional leaders who have the prestige, power, and authority to start strategic planning. They are knowledgeable about how to fit the process to key decision points – congregational meetings, councils, budget cycles, etc – so that planning and discussions can inform decisions in the relevant arenas.

What *Sponsors* Do:

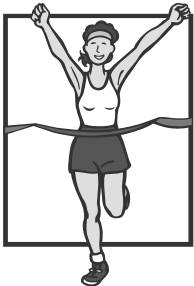
- Articulate the purpose and importance of the strategic planning process
- Commit necessary resources – time, money, energy, legitimacy – to the effort
- Emphasize at the beginning and various points that action and change will result
- Encourage and reward creative thinking, constructive debate, and multiple sources of input and insight
- Are aware of possible needs of outside consultants
- Are willing to exercise power and authority to keep the process on track
- Provide a “holding environment” which allows for a measure of safety and space for grief

CHAMPIONS

Champions – whose ranks may include key *Sponsors* – are the cheerleaders of the *Strategic Planning* process. They are the ones who will manage it on a daily basis. This group has a high need for those with interpersonal skills and a feel for complexity.

What *Champions* Do:

- Keep strategic planning high on people’s agenda
- Attend to the process without promoting specific solutions
- Think about what has to come together – people, tasks, information, reports – at or before key decision points
- Organize time, space, materials, and participation needed for the process to succeed
- Pay attention to the language used to describe strategic planning and implementation
 - Provide vocabulary and format that allows people to share views and deliberate about what is foundational for the congregation
 - Keep rallying participants and pushing the process along
 - Keep pushing until success is achieved or failure is clear
 - Rallying is easier if early wins and continued small wins are a part of the journey



- Develop champions throughout the congregation
- Are sensitive to power differences
- Communication Tip: Publish information updates via –
 - Special memoranda
 - Regular newsletters
 - “Think Pieces”
 - Special reports
 - Relevant web sites

- Other electronic means

FACILITATOR

Facilitators bring in group process skills which allow them to structure and manage group interactions in order to allow *Champions* and *Sponsors* to participate in discussions and build trust. *Facilitators* are typically from “outside” the congregation. This allows the *Facilitator* to be “neutral” or “objective” in the face of congregational politics

What *Facilitators* Do:

- Know the process and explain how it works at the beginning and at many points along the way: explain to participants where they are, where they can head, and how they might get there
- Tailor the process to the faith community and the groups involved: attention to both task and socio-emotional maintenance
- Convey sense of humor and enthusiasm for the process and help groups get unstuck
 - Help manage tension and relieve the tedium
 - Help groups reframe their situations, invent new options, channel conflict constructively, tap hidden courage, hope, and optimism
- Ensure that participants rather than the facilitators are doing the work
- Press groups toward actions and the assignment of responsibility for specific actions
 - Move the group from thinking to action
 - Probe the group about the merits of options and the advisability of taking specific actions
- Congratulate people whenever possible
 - People and churches suffer from chronic and acute positive reinforcement deprivation

DEVELOPING COLLECTIVE LEADERSHIP AND FOLLOWERSHIP

It is best to think in terms of developing and relying on teams, networks, and coalitions to allow for the appropriate leaders and followers at the appropriate time. As P.J. Palmer has noted, leaders build community by “making space for other people to act.”

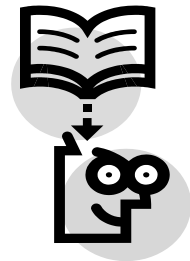
The worldview which leaders should seek is one likely to evoke widely shared notions of what constitutes the public interest and common good of the congregation. This wider worldview encourages and empowers coalitions to self-organize around ideas and interests which allow people to see what they can achieve together over against what they could not achieve separately. Once coalitions live into their visions, and the benefits of adopting and implementing *Strategic Planning*, the costs of doing so diminish and the process is enhanced.



Those with authority should establish – before *Strategic Planning* begins – mechanisms for sharing power, responsibility, and accountability. This will help build trust in the process and its results.

ETHICAL LEADERSHIP: NORMS, DISPUTES, RESIDUAL CONFLICTS

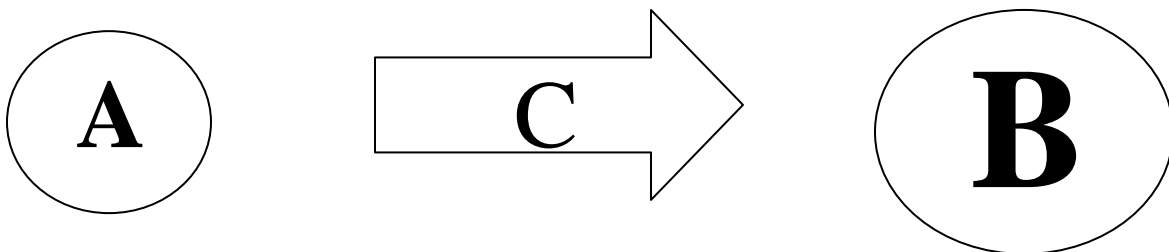
The issue of *Strategic Planning* usually involves some potential for conflicts as the congregation gives up old thinking and behavior patterns. There is also the phenomenon of “failure” as the congregation moves away from the old patterns, yet the benefit of the emerging patterns have yet to be realized. It is important that designs for handling these conflicts be considered from the outset so that congregants know and understand appropriate avenues through which they can register their concerns.



While in the midst of the process both formal and informal “courts” will be activated. Courts are initiated whenever two people having a conflict rely on a third party to help them address the conflict. Church leaders will want to ensure that formal and recognized courts are used.

Foster congregational integrity by educating people about the ethics, norms, and constitution and by-laws of the congregation. Ethical leadership requires formal courts to apply norms and constitution and by-laws to specific cases when warranted. Typically the authoritative body (church, council, and committee/team) applies constitution and by-laws while individual leaders apply norms.

Sometimes Strategic Planning will also involve changing the constitution and by-laws of a congregation. This transitional time has the potential of leaving holes in the expectation of behavior and governance. In the absence of a constitution and by-laws (as in the situation where they have been suspended) principal norms should be applied in such a way that public interest is served and the common good is advanced. The best test for discerning the public interest and the common good is by asking whether respect for future generations is implied in an outcome. A secondary test is empathy – is the congregation acting as stewards of the vulnerable, dependent, and politically inarticulate?

THE A-B-C OF STRATEGIC PLANNING

All change follows a simple map moving from **State A** to **State B**.

A: WHERE THE CONGREGATION IS AT: Present Reality

Where is the congregation currently at? Where is the church starting from in terms of attitude, values, purpose, skills, and resources?

B: WHERE THE CONGREGATION IS GOING: Preferred Future

Where does the congregation want to be? What is the church's destination, the church's ultimate outcome, the preferred future state? While remaining open to altering plans, mapping changes should always focus toward reaching a destination, achieving an outcome.

C: WHAT THE CONGREGATION NEEDS TO JOURNEY FROM A TO B: Resources

Having chosen the preferred outcome, the process of creating change is about helping the congregation access or acquire the resources it needs to journey from **A** to **B**. Resource needs vary from church to church and may include such tangibles as money or personnel, and intangibles as confidence or skills.

CREATING THE FUTURE NOT BLAMING THE PAST

From the change-agent's perspective it does not matter why or how the congregation got to where they are (**A**). What matters most is that the congregation knows where they are at, the preferred future they want to reach, and what they need to reach that outcome. Good leaders seek to open the future, not to blame the past.

The important note of this design is that persons want to be blessed and not told what to do. Appropriate discernment at the appropriate time blesses and helps the church to discern what is life-giving.

*A common belief about people is that they don't want to change. We think people do want to change – but what they don't want is to be ripped off. If the change that is offered is not perceived as a blessing it will be resisted. For people to gladly journey to **B**, they need to know what they value at **A** will not be taken from them, and the final state **B** will be of more value than **A**.*

~ Rob & Kim Voyle

DIRECTIONS OF CHANGE: AWAY FROM (DON'T-WANT) & TOWARD (DO-WANT)

As a general rule, congregants invest time, energy and resources either moving toward something they find pleasing or away from something they find threatening. What they use in deciding whether to move towards or away from an action or object is their values, which determine if something is good or bad.

Consider the story of a man who, when asked by a cabdriver where he wanted to go, answered "just get me away from here." This story illustrates the pitfalls of not knowing where you're going: "away from" may be worse off than "here". Like the famous scene from *Alice in Wonderland* when the Cheshire cat inquired of Alice where she wanted to go, Alice replied she didn't know, and the cat answered "If you don't know where you're going then any road will take you there." What the man in the taxi and Alice share in common is the *Away From* pattern for developing outcomes to their situations.



Motivation and action comes down to one's level of discomfort or inspiration. Those dealing with discomfort will move away from the source of irritation. Mother Theresa is quoted as saying that she began a life for others when she realized there was a little Hitler in her heart. This negative

image of cruelty and egoistic aggrandizement was a major motivator. Why don't you put your hand on a hot stove? Simple, you want to avoid the pain of third degree burns. These are examples of the usefulness of avoiding things we don't want and moving *Away From* them. *Away From* motivation helps us to identify and solve problems

A *Toward* pattern is outcome or goal oriented and allows us to articulate what it is we want, how we'll know when we get it, and keeps us motivated until the desired preferred future is achieved. Those who move *Toward* an outcome are usually those who feel inspired to implement changes which benefit the community. A *Toward* person will enter a cab and tell the driver the exact address. Should the cabbie inquire, "Why this place?" the *Toward* person will answer "because what I want is there."

Smart goals or outcomes take into consideration both what we don't want and what we do want. For example your church may come into a half million dollar gift. Absent *Away From* or don't-want thinking those responsible might place the money into all sorts of investments that perpetuate injustice around the globe. Absent *Toward* or do-want thinking the money might languish in a bank account making no difference in the life of your church.

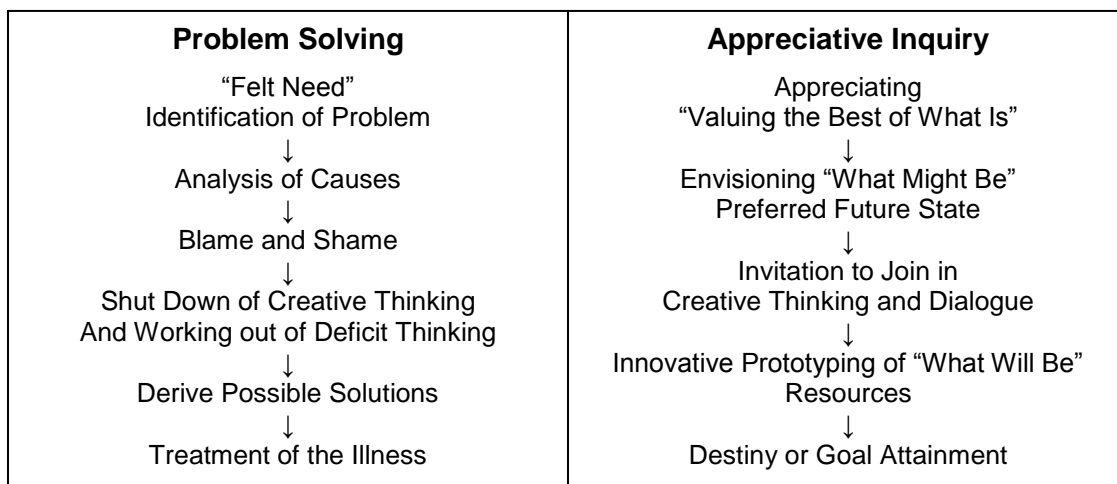
CONSEQUENCES FOR CHANGE MANAGEMENT

While both filters are needed in the dialogue of change the preferred future and outcomes that move a congregation forward must be stated in a *Toward* manner. If the outcomes and preferred future simply exists to move people away from a difficulty the congregation as a whole will be driven by crisis management. The *Away From* organization tends to gravitate to problems and often is distracted from other priorities and trajectories of movement. The *Toward* organization gravitates to confidence and out-of-the-box thinking.

Appreciative Inquiry (Ai) Change Process

Appreciative Inquiry is a strengths-based organizational change model which focuses on the positive qualities already existing in an organization. "Appreciate" means to value or admire highly; to judge with heightened understanding; to recognize with gratitude. "Inquiry" means to search into, investigate; to seek for information by questioning. Put simply AI is the study of what works well. ***In religious terms, AI is the discernment of where God is already at work in our congregation and how you might join that work.***

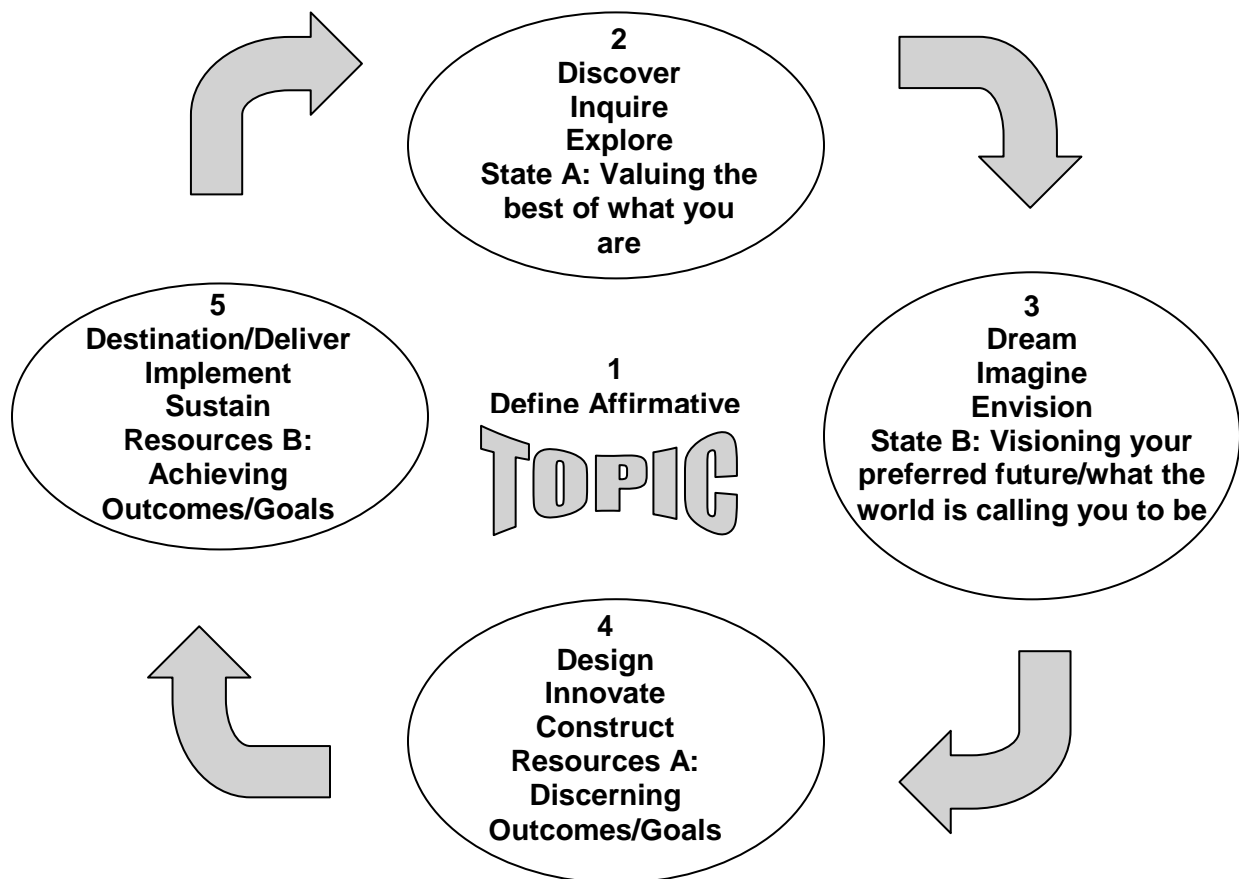
Traditionally we work with a deficit-based approach to problem solving of which the underlying assumption is that congregations are problems to be worked on. From the perspective of the strengths-based appreciative approach congregations are mysteries that should be embraced as centers of infinite imagination, infinite capacity, and infinite potential; that is living organisms.



Appreciative Inquiry starts with the assumption that how we begin, how we first approach a topic - where we place our focus – will determine whether we grow more of what is working or grow more of the problem. For example many fine organizations have given themselves to alleviating world poverty. Yet it is impossible to grow less poverty – what does it mean to have less of a negative? You can, however, grow economic bases and cottage industries. You can grow educational systems and medical care.

People are embolden when they are afforded the time to speak about their triumphs and victories. People shrink when they feel a microscope has been placed upon them to examine their weaknesses and failures. AI by placing the focus on strengths and capabilities allows organizations to tap into their own wisdom born of success and achievement. By providing for the celebration of what has been accomplished, not only does AI allow for strengths to be articulated and carried forward, but AI also allows for sheer joy to be turned into the positive energy that will carry the organization through planning implementation and action.

FIVE-D APPRECIATIVE INQUIRY CYCLE



APPRECIATIVE INQUIRY PROCESS

VALUES & IDENTITY: Appreciating the Best of What Is:*

AI Summit to draft Identity Statement (Who we are)

VISION: Imagining the Best of What Might Be*

Four to six weeks after above

AI Summit to draft a Vision Statement (Where we are going).

NOTE: this is to gather information and ideas only; the actual writing should be done by a small group.

OUTCOMES: Determining What Should Be**

Four to six weeks after above

AI Summit to Discern Goals for the next two years. Attention is given to condensing and prioritizing goals. It is also a time to determine resources needed to achieve each goal.

ACTION PLAN: Creating What Will Be**

Simultaneous with above or shortly thereafter

Back before the full organization within six weeks

What is the Action Plan – this part may be accomplished by leadership and then present to full congregation.

*Strongly suggest outside facilitator **May be done “in house”

Initiating and Agreeing on a Strategic Planning Process

Among the first things to accomplish when undertaking a process of *Strategic Planning* is to negotiate agreement on the process among key internal and external decision makers and opinion leaders about the general design and steps of the planning process. The support of these congregants is necessary if the efforts are to succeed. The agreement need not be about details, but about the overall planning effort and the main planning steps. It is best to think in terms of a series of agreements to be negotiated among various stakeholders before the planning process begins in earnest.

The agreements should cover:

- The purpose of the effort
- A statement of desired outcomes (not matter how sketchy)
- Steps in the process and the way feedback and learning will be accomplished
- The form and timing of reports
- The role and functions of the church council in relations to the effort
- The role, function, and membership of the strategic planning team
- A general sense of how stakeholders will be engaged over the course of the process
- A sense of how the internet, technological information sharing, and other avenues of information sharing will be used
- The likely requirements for success



- Any important limitations or boundaries on the effort
- Commitment of resources necessary to proceed with the effort
- Make clear what will not be changed for the time being.

Of importance to the success of the planning effort is the satisfaction of key stakeholders according to *their criteria*, or at least criteria they can accept.

STAKEHOLDERS

A *Stakeholder* is any person, group, or organization that places a claim on your congregation's attention, resources, and ministries, or affects the ministries of the congregation. Thinking in terms of "*Stakeholders*" instead of "member and friends" provides a more precise picture of the players involved in the life of a church. It is important to be aware of the specific criteria *Stakeholders* use to assess the congregation's performance. *Stakeholders* will judge the worth of a congregation by how well the congregation meets the criteria for success that the *Stakeholder* has chosen. These criteria typically relate to performance. If the congregation cannot demonstrate its effectiveness against the criteria, the *Stakeholders* are likely to withdraw their support.



Not all *Stakeholders* are the same though. What church leaders want to identify are *key Stakeholders*. Generally speaking, a *Stakeholder* analysis will place a person, group, or organization into one of four categories:

- **Players** – high influence and high interest in leading action
- **Context Setters** – high influence but low interest in leading action
- **Subjects** – high interest in leading action but low influence
- **Crowd** – low interest in leading action and low influence

Those who fall in the *Players* or *Context Setters* categories must be at the planning sessions, and must be involved from the beginning as they form the core of the key influencers of the congregation.

Since *Stakeholders* demand that congregations demonstrate effective performance and, thereby, justify their existence or at least paid leadership, it is imperative that public and transparent performance criteria be disseminated as widely as possible. *Stakeholders* look for information on resource allocations, organizational designs, and distribution of power.

Think in terms of what incentives are needed to motivate *Stakeholders* to an agreement. The agreement can be used to organize and govern the process and should include these "guarantees":

- **Procedural Justice** – that the procedures used to reach decisions and the decisions themselves are fair
- **Doctrine of No Surprise** – nothing is dropped "out of the blue."
- **Procedurally Rational** – the procedures used for planning are coherent and follow a series of steps where each step is understood, and relates to prior and future steps

Truly, what is important is gathering key *Stakeholders* to deal with a few important matters in a timely way.

ORGANIZING THE PROCESS

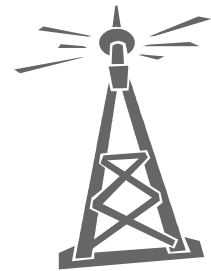
Broad sponsorship is valued over narrower leadership as a broad base helps to dispel the idea of a power-play by a small group. Also broad sponsorship can be sources of psychological safety which can help people address threatening anxiety or guilt-producing prospects of change.

Chaotic congregations have a sensitive dependence on initial conditions. Quick agreement is unlikely if the strategic issues imply a need for major change. It takes time to cope with anxiety, fear, anger, and denial that accompany change – particularly if culture and basic beliefs about the world are threatened.

Remember that agreements are iterative and are forged throughout the process. In these agreements congregations should work toward intangible, process-oriented outcomes such as purpose, identity, and value. It is determined and inspired people who get things done.

COMMUNICATION AND EDUCATION

Design and use communication networks with both the message and the messenger in mind. Besides traditional communication avenues of worship-time announcements and the church newsletter, also think through the use of web sites, social networks, information programs/packets, guidebooks, etc.



There is a two-stage timing to communications. First, people must *hear* about the proposed changes, preferably the same message across multiple channels many times. Andre Gide has quipped, “Everything has been said before, but since nobody listens we have to keep going back and begin all over again.” Second, people must *talk* about the changes in order to understand them, fit them into their own interpretive schemes, adapt them to their own circumstances, and explore implications for action and the consequences of those actions (or non-actions). By creating time for *hearing* and *talking*, congregants are given opportunities to develop shared meanings and appreciations that will further the implementation of change outcomes.

PERSONNEL GUIDELINES

As much as possible recruit highly qualified people committed to the change effort into leadership positions of the church. Help existing leaders and staff to understand that the effort will be challenging, meaningful, and will provide a sense of accomplishment. Build up “Psychic Income” which is the reward of being a part of an important adventure. Think through how the process will advance and be advantageous to those involved in the change effort. Finally, some thought should be given to creating viable “escape routes” if things go bad or if staff or volunteers want to leave on their own. These escape routes should be public knowledge so that congregants do not feel “trapped” in untenable positions.

From time to time you may need to give special attention to the problem of easing out, working around, or avoiding people who are not likely to help the change effort. Strategies for working with congregants who find themselves in this situation include:

- Satisfy objections by listening and attending to the deep wisdom of the concern
- Start a new team rather than give implementation responsibility to an existing group
- Strategies for working with people who will not help with change include

- Help them find places more suitable to them
- Have a policy to award those who actively work toward outcomes
- Place them in positions where they cannot damage the change effort
- Buy them off with legal and appropriate bribes
- Work around or ignore them

While working in appropriately pastoral and supportive ways, the German poet Goethe is our best guide: “Things that matter most must never be at the mercy of things that matter least.”

Thought and necessary actions to these initial pieces should take place during Phase 1 of the AI Cycle.

Assessing External And Internal Environments

Critical issues and growing edges are opportunities to build strengths and improve the ministry effectiveness of the congregation. It may be wise for church leaders to think in terms of faith and fears rather than strengths and weaknesses. Where is the congregation’s faith strong? Where is the congregation’s fear strong? Those who do not challenge their presumed, or taken-for-granted-future – their “official future” – are the ones most likely to be blindsided by changing trends and critical issues in society.

While assessing the context of a local congregation it is good to think in terms of its “competencies.” Every community of faith has abilities to do something, a set of ministries they excel at, or even processes that help them perform well in the eyes of their neighbors. There are three types of competencies to keep in mind:



- **Core Competency** – a ministry central to the congregation
- **Distinctive Competency** – a ministry difficult to replicate, and is a source of enduring congregational advantage
- **Distinctive Core Competency** – a ministry central to a congregation, central to the success of the community, and helps provides more public value than the alternative provides.

EXTERNAL ENVIRONMENT

Explore the *External Environment* to identify opportunities and critical community issues which may be avenues of new or renewed ministries. Outside factors, while beyond the congregation’s control, tend to shape the future of ministry development and outreach. The three major categories of exploration include 1) forces and trends, 2) key resource controllers, 3) actual or potential “competitors” and collaborators and partners. You want to scan the environment to identify key trends. Then you will need to analyze trends and interpret their importance and identify issues which affect ministry opportunities. Finally, you will want to provide reports that are useful for planning and decision making. Attending to the outside is crucial, because the social and public justification for a congregation’s existence is what it does, or proposes to do, about external social and public challenges, or problems.

INTERNAL ENVIRONMENT

Explore the *Internal Environment* to identify strengths and growing edges of the congregation’s ministry. Inside factors, within the control of congregation, tend to be about the present reality

the congregation lives. Short, thoughtful deliberations among key decision makers and opinion leaders concerning hopes and fears, critical issues, distinctive competencies, and desirable short-term/immediate actions can make apparent what is obvious. Such discussions can produce information vital to congregational survival and prosperity. The three major categories to explore are 1) resources, 2) present strategies/ministries, 3) performance. **At this point, *Strategic Planning* leaders' most important task is to articulate clearly what the congregation's current strategies-in-practice are.**

Transparent communications should be built around reporting this information back to the congregation as strategies appear first as patterns from the past, only later as plans for the future, and ultimately as perspectives to guide overall behavior. By far the most important strategic planning techniques are individual thinking and group deliberation.

The process of assessing external and internal environments should take place during Phase 1 of the AI Cycle as a way to set up a successfully informed Phase 2.

Clarifying Mandates

Mandates are the “musts” placed on a congregation which include requirements, restrictions, expectations, pressures, and constraints. Formal *Mandates* are encapsulated in a congregation's constitution and by-laws and state regulations regarding appropriate behavior of 501 (C)3 not-for-profits. Informal *Mandates* are embodied in norms and expectations of church members and friends: for example a pledge for X (homeless alleviation, children ministries, choirs, etc.) is a self-imposed mandate.

It is a fundamental error to assume the mission/vision of a congregation and the *Mandates* of a congregation are the same thing. A *Mandate* clarification exercise may prove fruitful for a church to separate its mission from the expectations laid on the congregation.

Clarifying *Mandates* includes answering these questions:

- Who is mandating and with what force?
- What do the mandates require as outcomes and performance?
- What is forbidden by mandates?
- What is permitted by mandates (boundaries to field of action)?



The clarification of *Mandates* increases the likely hood that they will be met and public value will be increased. Simply knowing what is not explicitly forbidden helps people examine the purposes of congregational action for creating public value. But be careful to avoid these three mistakes.

- Not articulating or knowing what the congregation must do.
- Belief that congregations are more tightly constrained in their actions than they are.
- Belief that if not explicitly invited to do something, the congregation is not allowed to do it.

Attention to *Mandates* and the *External Environment* is planning from the outside in.

The process of clarifying Mandates is best accomplished during Phase 1 or 2 and certainly should be done by Phase 3 of the AI Cycle. It may be a separate conversation within the formal

leadership brought to the wider members at an appropriate time or simply remain a measuring tool to assess goals by

Clarifying Mission And Values

Missions are the purpose and the why congregations exist. They guide congregations toward creating public value at reasonable cost. **Congregations are means to an end, not an end in**



and of themselves. As John Bryson insightfully notes, “Any organization that becomes an end in itself is doomed to failure.” *Missions* (in the sense of a clear vision of what we are about) remind us that we exist for something bigger than ourselves. Unless a congregation’s purpose is focused on socially useful and justifiable ends, and unless the theology and values are themselves virtuous, the congregation cannot hope to command indefinitely the resources needed to survive, including high-

quality, loyal, committed members and friends. Agreement on *Mission by Stakeholders* and key decision makers clarify:

- Congregation’s arenas of action
- The rules of the game within these arenas
- Implicit and explicit outcomes
- Possible performance indicators

As *Missions/Visions/Provocative Purpose Statements* are about the core values of a congregation, the potential for conflict arising out of misaligned values is present. Keep in mind that conflicts and resolutions will tend to reside in these areas:

- **Power Struggles** – the purpose of power-to-serve as opposed to power-to-weld
- **Congregation Structure & Systems** – who is empowered or disempowered by the design
- **Disputes over Resources** – how the use of those resources should be regulated
- **Conflicts over “Givens”** – what counts as a resource and what is discounted, devalued, or ignored.

Attention to *Mission, Values, and the Internal Environment* is planning from the inside out.

In AI terminology Provocative Purpose Statements are developed during Phase 2 of the AI Cycle.

Establishing an Effective Vision of the Preferred Future

A challenging yet achievable vision embodies the tension between what a congregation wants and what it can have. Visions alone are good guides for strategy implementation but tend to prove poor impetus for strategy formulation. For optimum momentum a vision should be paired with the congregation’s *Preferred Future*.

A sense of the *Preferred Future* helps a congregation understand how it should look and behave after it successfully implements strategies, achieves its full potential, and creates significant and lasting public value. A strong understanding of a *Preferred Future* helps to:

- Name what success looks like and how it might be achieved.
- Helps members and key *Stakeholders* imagine and create sustainable new circumstances by understanding the requirements for success.
- Articulates the way in which people can participate in creating a new and more desirable order.
- To enact what-the-world-isn't-yet



Descriptions of *Preferred Futures* should include a provocative purpose statement, values, philosophy, basic strategies, performance criteria, decision rules, and ethical standards. The aim of the description is to mobilize energy toward the *Preferred Future*. The description – whether given orally or in writing – becomes a kind of persuasive and continuing storytelling about the future. It provides a picture of success and desirable behavior for the church to move toward by helping us to not “predict” the future, but co-create the future.

The description as storytelling helps to clarify that a congregation’s vocation is tied to God’s calling and invitation in the Fredrick Buechner mode of “the place where your deep gladness meets the world’s deep need.” As such the description starts out as a fiction and becomes a fact through action. To this end, keep in mind that a carefully developed vision of the congregation’s *Preferred Future* provides important permission, justification, and legitimation to the actions and decisions that accord with this picture while at the same time establishing boundaries of permitted behavior. Within this context the *Preferred Future* of your congregation should be assessed against the established norms of the congregation.

Provocative Purpose Statements are created as part of Phase 2 of the AI Cycle. *Preferred Future* discernment is accomplished in Phase 3 of the AI Cycle.

Identifying Strategic Growing Edges

Strategic Growing Edges are fundamental policy questions or critical faith and fears affecting the congregation’s mandates, mission and values, ministry, beneficiaries, costs, financing, organization, or management.

For the process to prove successful there should be enough information and interaction to inform deliberation so that needed wisdom might emerge. Technically speaking “bullshit” occurs whenever someone talks without knowing what he/she is talking about. What matters is that those involved have the clearest picture as possible.

The focus at this juncture should be on questions and how they are framed and not on answers. Answers will arise, but if the questions are not appropriate or do not cast the congregation’s focus in the correct directions, the answers will be superfluous for *Strategic Planning*. With carefully framed issues, subsequent choices, decisions and actions are more likely to be politically acceptable within the congregation.

GROWING EDGES

Be aware that identifying *Growing Edges* can give clues to potential resolutions. By stating exactly what it is about a congregation's *Missions, Mandates, External, and Internal Factors* that makes them strategic, congregations also gain insight into possible ways the *Growing Edges* can be addressed. This identification process can create useful tension necessary to prompt congregational change, as communities of faith rarely change unless they *feel* the need to change. Yet, it should be kept in mind what the congregation is moving away from (don't-want) and what it is moving toward (do-want).

A "Statement of *Strategic Growing Edges* contains:

- Succinct description of the issue framed as a question that the congregation can do something about and has more than one answer.
 - If you can't do anything about it – it is a condition, not an issue.
 - If there is only one answer it probably isn't a real issue.
- Focusing on what a church can do and control helps to reduce pointless worry about what it can't do and can't control.
 - Focus on most precious resource – the attention of key decision makers on issues they can do something about.
 - Planning is action oriented producing useful decisions and actions
- Factors that make the issue a fundamental challenge. What is it about the congregation's *Mandates, Mission, Values, Internal Strengths/Growing Areas, External Opportunities/Challenges* – faith and fears – that make this a strategic issue?
- A statement of the consequences of failure that helps prioritize the issues
 - Does it affect the congregation's core?
 - Does it require action or monitoring?
 - Is it on the horizon and likely to require future action, maybe some present action?
 - Does it require an immediate response, or can it be handled through the routine processes and structure of the congregation?
- The statement should be a one page summary noting the source of ideas and options concluding with a one phrase idealized depiction of the congregation in the future.

**CULTURE CHANGE**

Every change born out of *Strategic Planning* will involve a *Cultural Change* in the congregation. Even though the congregation's character is strengthened as they identify and raise to consciousness their *Strategic Growing Edges*, congregants may feel anxiety and not feel the courage or the trust to move forward in the midst of the cultural shift. Pastoral care should develop around providing a "holding environment" or "sense making support system" to help manage the fear connected to anxious attitudes. As a side note, it may *not* be wise to have key decision makers focus first on the top-priority if they have had little prior interaction with each other in goal setting and outcome attainment. Better to have them focus on a less important issue so they can gain experience with working with one another and resolving conflict among themselves.

Ultimately it will be the culture of the congregation which decides which issues get on the agenda, how they are framed, and which strategic options get serious consideration.

POTENTIAL CONFLICT

Conflicts can be avoided by ensuring that the problems and *Growing Edges* have been properly defined. *Conflicts* typically involve issues as:

- What ministry is being pursued?
- How or how much is being pursued?
- Why it is being pursued?
- When is it being pursued?
- Who is advantaged/disadvantaged by the ministry being pursued?

DESIRED OUTCOMES

The *Desired Outcomes* of identifying your congregation's *Strategic Growing Edges* are:

- A list of growing edges faced by the congregation
 - Three categories of growing edges:
 - **Strategic** – affects *Mandates, Mission, Values, Ministry, Stakeholders*, finances, or structure: knowledge exploration
 - **Operational** – affects technical nature, strategy refinement, and process improvement of what already exist: knowledge exploitation
 - **Strategic and Operational** – as strategies emerge there may prove a need to manage their operational affects. Always manage the strategic issues before moving to the operational concerns.
- Arrange *Strategic Growing Edges* into an order such as priority, logical, temporal, etc.
 - Three kinds of *Strategic Growing Edges*:
 - Continuously monitored, but no need for immediate action
 - Issues handled as part of regular planning sessions
 - Issues that require an immediate response

The identification of *Strategic Growing Edges* is usually accomplished in Phase 3 of the AI Cycle.

Strategies For Goals/Outcomes Planning

We can understand “strategy” as an agreement to achieve the *Mission*, meet the *Mandates*, and create *Public Value* which defines what a congregation is (identity), what a congregation does (purpose), and why it does what it does (values). With this understanding strategies become the bridges between your congregation and the community it ministers in. *Strategic Growing Edges* indicate where the bridges should be located.



Strategies or *Goals/Outcomes Planning* tend to articulate desired patterns which usually appear first as patterns out of the past (State A), only later as plans for the future (State B), and as perspective guide to overall behavior (State C). Even if the *Goals/Outcomes Planning* is emergent, strategies should be tailored to fit a church's culture – though the purpose of the strategy may be to change the culture. Culture refers

to those implicit or explicit principles, norms, rules, and decision-making procedures around which the expectations of *Stakeholders* and beneficiaries or church ministries converge.

POSSIBLE PITFALLS

Goals/Outcomes Planning fails on two accounts. One is when specific steps to implementation are absent. The other is when there is no alignment or consistency between what a faith community preaches, what its members tithe for, and what it actually does

Effective strategies meet these criteria:

- Technically workable
- Administratively feasible
- Politically acceptable
- Results oriented
- Fit congregation's theology/philosophy and core values
- Ethical, moral, legal
- Further the creation of public value
- Deal with strategic issue they are suppose to address

THREE AREAS OF INTEREST FOR GOALS/OUTCOMES

Goals/Outcomes Planning deals with three areas. The first area is what will be kept and improved so that what is already life giving at where the congregation is presently at (State A) can be grown larger in the *Preferred Future* (State B). The second area is what will be stopped or pruned so that which does not contribute to the life giving energies of the congregation can be laid down at State A and not brought into State B. The third area is what new thing will be initiated so that State B is larger and more inviting than State A.

PLANNING FOR THE INEVITABLE FAILURE

A note of warning needs to be sounded and understood at this juncture.

All innovation fails about halfway through. By definition an innovation is something that has not been tried before (at least by the congregation), and success can only be determined after the innovations are implemented. Thus, strategies must be defined and managed in a way to help ensure that while some failures may occur, the strategy itself is a success at the end.



Ways to manage these transitions and their failure include:

- **Strategic Waiting** which implies slowing down the process in order for people to get comfortable with the new reality and can feel or figure out a way forward
- **Break down transitions** into manageable steps which lead to bigger leaps, or small goals that lead to the big goal
 - Emotional bonding to the emerging reality occurs gradually through early and ongoing implementation efforts. The bonding process will most likely fail if the gap between old and new realities (State A and State B) is too large
- **Early implementation** of parts of the strategies that facilitates congregational learning while allowing for revision or correction before full implementation

WRITING A STRATEGIC PLAN

When writing a *Strategic Plan* the following should be included:

- Statement of Mission/Vision/Provocative Purpose Statement
- Values
- Strategies arranged by theme with
 - Desired outcomes
 - Action steps
 - Success measures
 - Consequences
 - Primary strategic themes:
 - Beneficiaries – how we engage in ministry
 - Administration – in what aspects of mission must we excel to provide quality ministry to the beneficiaries
 - Resources – sustainable resources which allow the mission to be achieved within reasonable costs
 - Staff – developing employees and volunteers responsive to the mission and ministry of the congregation.
- A description of the process by which the strategies were developed.
- Acknowledgement of those involved.
- The goal for the *Written Strategic Plan* is to produce a fairly clear picture providing a sense of where the congregation is presently at, where it is going, how it will get there, and why the particular strategy is an important part of successful change efforts.



Strategies or *Goals/Outcomes Planning* is accomplished during Phase 4 of the AI Cycle.

Reviewing And Adapting Goals/Outcomes Planning

Having strategies reviewed and adopted helps affirm the desired changes and moves the church to “refreeze” in the new pattern.

FIVE QUESTIONS FOR STRATEGY DEVELOPMENT

- What are the practical alternative visions we might pursue to address our *Preferred Future*?
- What are the barriers to the realization of our *Preferred Future*?
- What major proposals might we pursue to achieve our *Preferred Future* or to satisfy barriers?
- What actions (with existing job descriptions) must be taken within the next year (or two) to implement the proposals?
- What specific steps must be taken within the next six months to implement the major proposals and who is responsible?

FIVE QUESTIONS FOR STRATEGY REVIEW

- What is really reasonable?
- Where can we combine proposals, actions, and specific steps?

- Do any proposals, actions, or specific steps contradict each other? If so, what should we do about them?
- What (including resource allocation) are we or key implementers really willing to commit to over the next year?
- What are the specific next steps that need to occur in the next six months for this strategy to work?

To sell the plan key decision makers and important *Stakeholders* must be offered specific inducements to gain their support. These inducements must be geared to the makers' and shakers' values, interests, and frame of reference, as they will judge the proposal according to their own criteria.

THREE WINDOWS OF OPPORTUNITY (WHEN ACTION FAVORING CHANGE IS POSSIBLE)

- Those opened by emerging or pressing issues
- Those opened by important political shifts (new nominations, new staff, change in priorities)
- Those opened by reaching decision points (time when official bodies are authorized and empowered to act)



CLARITY IN COMMUNICATIONS

Describe strategic alternatives in enough detail to permit reasonable judgments about their efficacy and to provide reasonable guidance for implementation:

- Intended outcomes and performance measures
- Principal components or features including capabilities and competencies
- Timetable
- Groups and people responsible for implementation
- Resources required
- Costs
- Estimated savings (if any)
- Effects upon other areas of the congregation
- Effects on other strategies
- Policy or protocol changes
- Procedures for tweaking the strategy during implementation
- Associated risks and how they might be managed

CRITERIA FOR EVALUATING ALTERNATIVE STRATEGIES

- Ecological – does it align with our purpose, identity, and values?
- Politically Acceptable – does it satisfy the public?
- Administratively and Technically Workable – does it coordinate or integrate with other strategies, ministries, and activities, present budgets, existing facilities, staffing patterns and job descriptions, risk management assessments?
- Results Oriented – achievable, measureable outcomes
- Legally, ethically, and morally defensible?

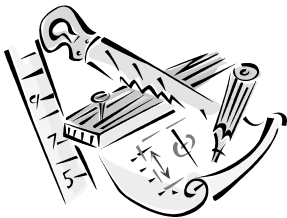
PUBLIC EVALUATION OF OVERALL PLAN

- Overview of plan in written form
- General discussion of plan and reaction to it – is it in the ballpark?
- Brainstorm list of plan strengths
- Brainstorm list of plan growing edges, soft spots, and omissions.
- Brainstorm list of modifications that would improve on strengths and minimize growing edges.
- Agreement on plan.
- Agreement on next steps to implement or complete the plan.
- Reassurance Tip:
 - Allow for a period of catharsis
 - Pastorally touch basis with those who feel marginalized
 - Provide a ritual of closer for the planning team
- Take a vote with emphasis on steps to implement
- If the vote is negative of the feelings raised are negative:
 - Not the right time
 - Draft strategies and plans are inadequate or inappropriate
 - Issues addressed are not perceived as pressing
 - Congregation cannot handle the magnitude of proposed changes and should be scaled back
 - Strategies and plans should be taken to another arena

This process is accomplished as the AI Cycle moves from Phase 4 into Phase 5.

Developing an Effective Implementation Process

Changes indicated by the strategies must be incorporated throughout the congregation. An eye toward *Implementation* designs should allow for adaptive learning as new information becomes available. Key decision makers should pay regular attention to how *Implementation* is proceeding in order to focus on any difficulties and to plan how to address them. Mutations of plans which develop during the *Implementation* should be welcome as they may provide better ways to addressing issues than the original *Strategic Plan*.



The reasonably smooth and rapid achievement of goals coupled with heightened *Stakeholder* satisfaction lead to the most important long-term outcome for the *Implementation Process* – added *Public Value*.

To accomplish smooth *Implementation* leaders should think through the following:

- Ways of building capacity for sustained *Implementation*
- Outcome achievement
- Ongoing learning
- Readjustment based on learning
- Building capacity for the next round of planning

- Best to chunk plan down into bite-sized manageable pieces
- Involve the same people in both strategy formulation and *Implementation* if possible

DEVELOPING AN ACTION PLAN

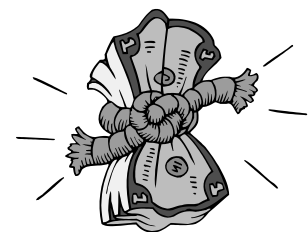
- Definition of Purpose
- Clarification of the process by which resources are converted to ministries.
- Specify expected results, objectives, and milestones
- Specify action steps
- Calculation of resources desired
 - Financial
 - Staff and Volunteers: Clarify roles and responsibilities of implementation bodies, teams, and individual
 - Communication Routes
 - Others as needed: facility, location, partners/collaborators, etc
- Notate schedules and deadlines
- Identification of target beneficiaries
- Clarification of program or project structure and mechanism for resolving conflicts.
- Plan to review and monitor process

BUDGETS

John Bryson states, “The hustle, hassle, and uncertainty of politics means that budgeting typically tends to be short-term, incremental, reactive, and oriented toward tracking expenditures and revenues. Long-term budgets are comprehensive, innovative, proactive and oriented toward accomplishment of broad purposes, goals, or priorities.”

Strategic Budgeting simply means thinking smartly and with adaptability about budgets and the budget process of the congregation. A good insight to remember is that short-term budgets tend to reflect planning for control while long-term budgets tend to reflect planning for action. With this in mind here are things to be aware of:

- Have *Strategic Planning* precede the budget cycle
- Build a performance budgeting system: budgets which define the ministry and outcomes congregations intend to buy with each sum they appropriate.
- Use prior strategic planning efforts to influence budgeting in strategic directions.
- Pick budget fights carefully
- Consider entrepreneurial budgeting – allowing leaders the autonomy with accountability for results
- Secure good analysis and seasoned stakeholders buy-in
- Develop criteria for evaluating the budgets for all preexisting and new programs to ensure objectivity



IMPLEMENTATION GUIDELINES

- Think through implementing the implementation steps

- Communication Tip: Develop implementation strategy documents – including key indicators, and action plans to guide implementation and focus attention on necessary decisions, actions, and responsible parties.
- Try for changes that can be introduced easily and rapidly. Implementation will flow more smoothly and speedily if the changes:
 - Are conceptually clear
 - Are based on a well-understood theory of cause-effect relations
 - Fit with the values of all key implementers and tap their emotional commitments to those values
 - People have a chance to see what they are supposed to do before they have to do it
 - Are relatively simple to grasp in practice, because the changes are not only conceptually clear, but also are operationally clear
 - Are administratively simple, entailing minimal bureaucracy and red tape, minimal reorganization of resource allocation patterns, and minimal retraining of staff and volunteers
 - Include adequate attention to pay offs and rewards necessary to gain wholehearted acceptance of implementers
 - **Can be summarized in a compelling story**
- Use a “program and project management” style: chunk changes into programs consisting of specific projects
- Build in enough people, time, attention, money resources, to ensure successful implementation.
- Link new strategic initiatives with ongoing ministries and programs.
- Work quickly to avoid unnecessary or undesirable competition with new priorities.
 - Sell cost-effectiveness: great benefits in relation to costs
 - Changes in leadership will bring a change in priorities
- Focus on maintaining or developing a coalition of implementers; interest groups intent on effective implementation of the changes and willing to protect them over the long haul.
 - Coalitions are organized around ideas, interests, and payoffs, so leaders must pay attention to aligning these elements in such a way that strong coalitions are created and maintained.
 - Strong coalitions will result if those involved see their interests are served by the new arrangements.
- Three general prescriptions to align interests and change
 - Persuasion and discussion
 - Pressure from leaders
 - A sense of crisis
- Reassurance Tip: Think through how residual disputes will be addressed and underlying norms enforced.
- Leaders and planner should facilitate necessary changes in cultural symbols and artifacts, espoused values, and underlying assumption, recognizing that it is far easier to



change the first two that it is to change the third. Indeed, heavy-handed attempts to change underlying assumptions are more likely to promote resistance and rejection than acceptance.

- Emphasize learning – create learning forums
- Communication Tip: how can clear and delivered communications support implementation and ongoing learning?
- Create an accountability system that assures key stakeholders that political, legal, and performance-based accountability needs are met. Efforts to demonstrate accountability for results, the wise stewardship of resources, the satisfaction of key stakeholders, and ongoing learning and improvement are typically always in order.
- As long as positive benefits are being produced within budgets, change momentum may build simply as time goes by.
- Communication Tip: Build in regular attention to appropriate indicators such as attention to progress against the Strategic Growing Edges that prompted strategic planning.

STAGED IMPLEMENTATION

- **Prototyping** – producing various ideas, sketches, and early version of what might be implemented
- **Pilot Project** – design to discover or prove cause-effect between particular solutions and particular efforts
 - Design Pilot Projects with concern on the effectiveness of the change – not its efficiency.
- **Demonstration Project** – make it clear the solutions known to work can be more fully implemented
 - What is being tested is a process that is already known to work from the Pilot Project
 - Carry out appropriate monitoring tasks
 - Provide for future implementers to witness demonstrations
 - Communication Tip: Develop a strategy to communicate the desirability of the changes and the best way they may be implemented
- Give special attention to those who implement change in the early stages – they are the pioneers.
- **Do not allow the church to become an end in itself**



Developing and implementing Goals/Outcomes Planning is accomplished in Phase 5 of the AI Cycle.

REASSESSING

Review provides the important prelude to the next round of planning. It is a good idea to give attention to several parts of the plan:

- Maintenance of good strategies
- Modification of less successful strategies
- Elimination of undesirable strategies
- Awareness of discriminatory consequences – who might this disadvantage?

- Scrutiny of existing expectations
 - Refinement and differentiation of expectations based on newer experiences
 - Willingness and capability to invent new expectations that make sense of unprecedented events
- A more nuanced appreciation of context and ways to deal with it
- Identification of new dimensions of context that improve foresight and current functioning

FOUR MAIN REASONS STRATEGIES CEASE TO WORK

- Good strategy but insufficient resources devoted to implementation, and therefore, little progress made toward resolving strategic issues
- Problems change
- Crowded and competing policies and strategies
- Political environment may shift (leadership change over)

ADVANTAGES OF REASSESSING AND REVISING

- Capabilities remain responsive to important substantive and symbolic growing edges instead of becoming stuck in patterns of response to old issues. When issues change, the church often does not and becomes a problem itself.
- Resolution of issues that arise during implementation
- The continuous weeding, pruning, and shaping of crowded strategy areas
- Improved organizational knowledge
- Foster development of the energy, will, and ideas for significant reform and existing strategies.

RESULTS-BASED MANAGEMENT SYSTEM

- Pay attention to the congregation's mission and mandates, and the social needs and political problems that justify its existence
 - **Do not allow the church to become an end in itself**
- Focus on indicators of success and failure



- Review the issue framing used to guide strategy formulation in the first place
 - Use existing review opportunities or create new ones
 - Council meetings
 - Budgets reviews
 - Create a review group
 - Challenge institutional and organizational rules that favor undesirable inertia
- Typically it is easier to change strategies than to change the congregation
 - Stay fresh

STRATEGY FOR MAINTAINING

- Seek little change in current congregational arrangements
 - Find occasions to recall and reinvigorate the congregation's mission and vision which originally inspired it
 - Validate the results of previous strategy formulation efforts

- Rely on implementers and focused input from beneficiaries and involved advocates
- Invest in distinctive competencies and distinctive assets necessary for the success of the strategies

STRATEGY FOR CHANGE

- Significantly alter existing arrangements so that a new set of issues emerge
- Create occasions to challenge existing meanings and estrange people from them.
Create new meanings and facilitate their enactment
 - Mission, mandates, policies, and strategies that support particular ways of being in the world
 - Estrangement creates a circumstance in which givenness becomes possibility
 - Before new proposals for strategies can be adopted, key decision makers must be receptive
- Strategy succession may be more difficult than the adoption of the initial strategy was because existing strategy is now likely to have a coalition of supporters in place
- Both implementers and beneficiaries of existing policies are more likely to be concerned with strategy implementation details than with policy innovation
- To make major strategy changes, rely on key decision makers, along with policy implementers and beneficiaries
- Consider a move to split aspects of the strategy or to consolidate strategies
- Consider building a new system without dismantling the old system
- Invest in distinctive competencies and distinctive assets that continue to be relevant

STRATEGY TERMINATION

- Fundamental task is to estrange important stakeholders from strategies to be terminated
- Engage in cutback management of programs to be eliminated or reduced

BUILDING A STRATEGIC MANAGEMENT SYSTEM

- Apply system to the full church organization
- Build on performance measurement and management approaches already in use
- Focus on a small number of key results and indicators
- Use a common set of categories for performance measures
- Connect performance measures to specific programs, services, and activities
- Support linking congregational performance and individual performance
- Use the strategic management system to support planning, decision making, budgeting, evaluation, and learning
- Review and update the system on a regular basis



SNAGS AND SLOW DOWNS

- Keep in mind the potential benefits of the process
 - Remember the process is prone to hit snags at the point of strategic issue identification and strategy development
 - It may take several years to know if a strategy has worked or not

- Label as much as possible a success
 - Optimistic stance sees difficulties as
 - Specific rather than pervasive
 - Temporary rather than permanent
 - Something that can be changed
 - Psychological Hardiness
 - Build commitment to church's mission
 - Build a sense of control over the church's future
 - See difficulties as manageable challenges
 - Creating lasting public value almost always take committed, courageous, hopeful people
- Strategic planning is not right for every situation
 - When the going gets tough remember Woodrow Wilson's endorsement: "To work for the common good is the greatest creed."

Reassessing is done throughout the AI Cycle. However, as outlined above this would be part of Phase 5 which leads into a regenerating of Phase 1 for the next round of Strategic Planning.

Getting Started

Theologically speaking, the church belongs to Christ and exists to extend Christ's ministry and offer of salvation.

Sociologically speaking, the church is numbered among the varied and myriad human organizations which help societies to engage the issues of the times and, hence, add to human service and the common good. Sociologically the purpose of a congregation is to:



- Fulfill its *Missions*
- Meet its *Mandates/Expectations*
- Create *Public Value*
- Satisfy its key *Stakeholders*

When approaching the issue of *Strategic Planning* it is beneficial to hold the theological and sociological purpose in a healthy tension. Once this tension is established, dynamic and creative deliberations can take place.

STARTING STRATEGIC PLANNING

You need not wait for things to "improve," or "align," or even "come to a head." You simply start with where you and the congregation are by educating those involved about the purposes, processes, and products of *Strategic Planning*. It is best to present a compelling reason – wrapped in a story – for this undertaking. The story becomes a flexible medium that can be shared and owned by a broad-based, collective leadership which is spread throughout the congregation.

At the same time you are supplying the compelling reason for *Strategic Planning*, you will want to be attentive to the feedback you are receiving. In this feedback you will discover the requirements of success and pointers on how to tailor the process according to the needs of the

congregation and the community you serve. All planning efforts should fit the situation at hand, even if the aim is to change the situation.

Pay attention to the presence or absence of formal and informal:

- Forums for discussions
- Arenas for decisions and implementation
- Courts for managing residual conflicts and enforcing norms

All viable strategies will need to be:

- Politically acceptable
- Technically and administratively workable
- Legally and ethically justifiable

In short you want to evaluate the criteria *Stakeholders* use to assess effectiveness of strategies.

HOSTING GENERATIVE CONVERSATIONS

The big innovation in *Strategic Planning* is having key *Stakeholders* and decision makers talk with one another about what is truly important. These conversations help you and other opinion leaders to seize opportunities to be interpreters and direction-givers in areas of uncertainty and difficulty.

With timely communications you can turn dangers, threats, and crises facing your congregation into manageable *Growing Edges*. With precise communications you can reveal and name real needs and real conditions faced by your church. These conversations allow you not only to delineate patterns and issues, but also to explain them by relating them to your congregation's experience and even uncover contradictions in congregational values or between congregational and societal values.



Within these conversations you begin to help leaders and followers frame and reframe issues and strategies. You frame an issue by naming, characterizing, and explaining the issue. Framing helps to open the door to alternative ways of addressing issues and suggesting outcomes. You reframe by braking with the old established ways of viewing an issue or strategy and developing a new appreciation of it.

These conversations are times to offer a compelling vision of the future through the use of effective stories. Such stories are rich with metaphors which make sense of your congregants' experience, are comprehensive yet open-ended, and compel people toward union or common ground.

As an aside, to be effective the vision and the symbols the vision incorporates should be enacted through appropriate rituals which honor what is to be preserved, celebrate what's being added, and mourn what has to be discarded.

Finally, these conversations are prime time to articulate desired and expected consequences. Speaking of these within the context of a vision of the future ensure actions and consequences are an integral parts of the values, mission, and strategies.

RESOURCES FOR STARTING

The resource most needed to undertake *Strategic Planning* is not money, but the attention and commitment of key decision makers. You can work to improve their participation in the process by keeping the process simple, keeping the process quick, and thinking in terms of “junctures.” A juncture is when key people must come together at the right time with the right information in order to discuss what is important and do something effective about it.

Other resources that you may wish to think about employing are consultants and facilitators. Otherwise you are ready to ask the first question of the right group about the correct topic.

Written Resources Cited

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