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# **PTH 971 STRATEGIC PLANNING**

## **ASSEMBLIES OF GOD THEOLOGICAL SEMINARY**

*February 14-18, 2011*

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### **COURSE DESCRIPTION**

Leading a religious organization has never been easy, and many are increasingly aware of the dynamic environmental shifts – globally and locally – that offer opportunities and challenges for local congregations and nonprofits. For Christians, change and strategic planning is a spiritual journey with God -- embracing spiritual and theological disciplines in order to discern what God is doing in the congregation and in the world. This course will examine the leader as guide in redefining the shape of a missional organization as part of the *missio Dei* in a pluralistic society. It will focus on the nature of change and resistance, different assessment and strategic planning models, and appreciative inquiry.

### **COURSE OBJECTIVES**

Participants will:

1. understand how the leader's interior life relates to spiritual discernment, fruit bearing ministry, and transformational change;
2. explore the interplay of values, vision, mission and environmental change that informs the local congregation and forms its ministries;
3. examine the nature of change and resistance vis-à-vis spirituality, theological reflection, and the social sciences;
4. investigate selected strategic planning processes and appreciative inquiry; and
5. understand the role of team leadership in change, strategic planning, and appreciative inquiry.

### **COURSE TEXTBOOKS**

Mark Lau Branson, *Memories, Hopes, and Conversations: Appreciative Inquiry and Congregational Change*. Herndon, VA: The Alban Institute, 2004.

Drucker, Peter F. *The Drucker Foundation Self-Assessment Tool: Participant Workbook*. San Francisco: Jossey-Bass, 1999.

Roger Heuser and Norman Shawchuck, *Leading the Congregation: Caring for yourself while serving others*. Nashville: Abingdon Press, 1993). It is important to obtain the revised and expanded edition to be released in October, 2010.

Jim Horan, *The One Page Business Plan (Non-Profit Edition)*. Berkeley: The One Page Business Plan Company, 2007.

Alan J. Roxburgh, *Missional Map-making: Skills for Leading in Times of Transition*. San Francisco: Jossey-Bass, 2010.

Bruce Wren, Philip Kotler, and Norman Shawchuck, *Building Strong Congregations: Attracting, serving, and developing your membership*. Hagerstown, MD: Autumn House Publishing, 2010.  
*Compiled Readings are distributed in electronic format.*

## **COURSE PEDAGOGY**

In a graduate learning community participants bring wisdom through their experiences, test personal assumptions, and learn from a variety of sources and methods during the class sessions. Course format will include lectures, individual reflection, group discussion, case studies, student presentations, and multi-media.

## **COURSE REQUIREMENTS**

**Pre-Session Assignments** (Bring hard copy of the following assignments to class: two reading reflections, and draft missional description statement)

### **Course readings**

Acquaint yourself with all the required readings for this class, and be prepared to discuss them in class. Using the format below, write up a two page reflection for two of the following texts: Heuser/Shawchuck; Roxburgh; and Wren/Kotler/Shawchuck.

- a. *Four observations* about the readings...
- b. *Three questions* about the readings...
- c. *Two thoughts* “remind me of the time when...”
- d. *One “ah-ha”* insight...

### **Draft Missional Description Statement<sup>1</sup>**

The Draft Missional Description Statement describes the participant’s current congregational setting. Do whatever preliminary research that documents your assumptions and descriptions. This may include interviewing leaders and staff members in the church, reviewing denominational literature, accessing information from local city offices and/or websites, evaluating personal observations, and initiating interaction with people in the congregation. Statement should be approximately 1,500 words (approx 350 words/page). Follow a style guide (e.g., Turabian/Chicago) and use footnotes or endnotes for source documentation.

The missional description statement includes the following structure:

#### Part One: The Nature of your Faith Community

- a. What is the character of the congregation? What is it known for – inside and outside?
- b. What is its ecclesiastical structure and denominational flavor?
- c. What are its demographic characteristics?
- d. How would you describe the spirituality of your congregation?

#### Part Two: Your Faith Community’s Context

- a. In what kind of larger community does the church exist?
- b. What are the history and demographics of that setting?
- c. What are the religious mix and character of that larger community?

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<sup>1</sup> Outline of missional description statement was adapted from Dr. Mike McNichols, Fuller Theological Seminary, Irvine campus.

### Part Three: Your Faith Community's Missional Potential

- a. What is the role of spirituality and a missional focus?
- b. Is the life of the church conducive to a missional focus?
- c. What would have to change for the church to have such a focus?
- d. What role might you play in such a change?

Note: There are many websites that engage in missional church ideas and dialogue. For example, check out the Roxburgh Missional Network: <http://www.roxburghmissionalnet.com/>

### **Post-session assignment (approx 20-25 pages) due Tuesday, April 19, 2011**

Design a strategic planning process for your congregation, ministry, or religious organization that will incorporate change theory and a planning process learned from the course readings and class lectures/discussions. Though details of different strategic planning models will be discussed in class, generally speaking, the project could include the following:

#### **I. Purpose/thesis statement (20%)**

- Introductory paragraph introduces reader to your topic by describing a situation or identifying a need
- Clarity, substance and thoroughness of author's purpose sets the direction and clear boundaries of your research
- You may include research questions/goal statements following the statement of purpose that becomes the outline of the body of your paper

#### **II. Body of paper (50%)**

- The *selected literature search/conversation partners* identify the "clear voices" with whom you dialogue in pursuing your research purpose/goals.

The development of thoughtful argument (or principles of organization) may include narrative/chronology, comparison and contrast, cause and effect, division and classification, and analysis. The quality of argument must include reliable sources, including objections that are also fairly represented.

#### **If your project is more "applied" than traditional research paper...**

- The *project narrative* is a write-up that includes:
  1. Type of intervention: change model, strategic planning, or appreciative inquiry?
  2. Selection of subjects: who participated in your study and why did you select them?
  3. Instrument/process used: did you use interviews, focus groups, questionnaires, processes etc (place instruments in appendices)?
  4. Results/data analysis: what were the results of the instruments/processes used in this study?

In your discussion, include references to course readings and outside sources that contributed to your analysis.

#### **For both selected literature search and project narrative alternatives:**

- *Reflection and praxis* can be a separate section by itself or this may be integrated in your discussion in the literature review. This is a "so what" question that moves the conversation toward some application of theology or theory.

- *Clarity and logic of important ideas and arguments.*  
Did you adequately make your case? Were you clear in your major ideas that provide the backbone of the paper, as well as how logically these ideas are organized in relation to each other and to the major purpose statement/goals?

### III. Conclusion (10%)

- The *summary, conclusion and suggestions for further research* answers the major question whether or not the purpose of the paper has been achieved. Suggestions for further research identify direction for future consideration.

### IV. Appendices (5%)

- Include instruments, notes, and ancillary materials that were not included in the body of the paper, but they were referenced.

### Regarding the style and format of a paper (15%)

- Use clear language, primarily using the active voice instead of the passive voice. Consistently employ proper grammar, spelling, and punctuation.
- Each paragraph has a central idea that is adequately developed and supported, and there are transition sentences that clearly link the development of thought in paragraphs throughout the paper.

Be consistent in the Chicago/Turabian style format (See <http://www.docstyles.com/archive/cmscrib.pdf>).

## COURSE GRADES

	Points
Pre-session reading	25
Pre-session assignment	25
Final project	50

Grading will be on a percentage basis, with 90% of the total points (90) required for an A, 80% of the points (80) required for a B, etc. Plusses and minuses will be used for point totals within 2 points of any grade level.

## SUBSTITUTE TEXTS

There are multiple titles on mission and culture, change, strategic planning, and leadership. If you have already read any of the texts listed for this course, you may substitute with selections from the bibliography below.

**SELECTED BIBLIOGRAPHY:***Theology of Mission*

- Barrett, Lois Y. ed. *Treasure in Clay Jars: Patterns in Missional Faithfulness*. Grand Rapids, MI: Wm. B. Eerdmans, 2004.
- Brownson, James V. Inagrace T. Dietterich, Barry A. Harvey, and Charles C. West, *Stormfront: The Good News of God*. Grand Rapids, MI: Wm. B. Eerdmans, 2003.
- Frost, Michael. *Exiles: Living Missionally in a Post-Christian Culture*. Peabody, MA: Hendrickson Publishers, 2006.
- \_\_\_\_\_ and Alan Hirsch, *ReJesus: A Wild Messiah for a Missional Church*. Peabody, MA: Hendrickson Publishers, 2009.
- \_\_\_\_\_, *The Shaping Of Things To Come: Innovation and Mission for the 21<sup>st</sup> Century Church*. Peabody, MA: Hendrickson Publishers, 2003.
- Guder, Darrell L., ed. *Missional Church: A Vision for the Sending of the Church in North America*. Grand Rapids, MI: William B. Eerdmans Publishing Co., 1998.
- \_\_\_\_\_, *The Continuing Conversion of the Church*. Grand Rapids, MI: William B. Eerdmans Publishing Co, 2000.
- Alan Hirsch, *The Forgotten Ways: Reactivating the Missional church*. Grand Rapids, MI: Brazos Press, 2006.
- George R. Hunsberger and Craig Van Gelder, eds., *The Church Between Gospel and Culture: The Emerging Mission in North America*. Grand Rapids, MI: Wm. B. Eerdmans, 1996.
- \_\_\_\_\_, *Bearing the Witness of the Spirit: Lesslie Newbigin's Theology of Cultural Plurality*. Grand Rapids, MI: Wm. B. Eerdmans, 1998.
- David Kinnaman and Gabe Lyons, *UnChristian: What A New Generation Really Thinks About Christianity... And Why It Matters*. Grand Rapids, MI: Baker Books, 2007.
- Brian D. McLaren, *Everything Must Change: Jesus, Global Crises, and a Revolution of Hope*. Nashville: Thomas Nelson, 2007.
- Reggie McNeal, *The Present Future: Six Tough Questions for the Church*. San Francisco: Jossey-Bass, 2003.
- \_\_\_\_\_, *Missional Renaissance: Changing the Scorecard for the Church*. San Francisco: Jossey-Bass, 2009.
- Craig Van Gelder, ed., *Confident Witness—Changing World*. Grand Rapids, MI: Wm. B. Eerdmans, 1999.
- N.T. Wright, *Surprised by Hope: Rethinking Heaven, the Resurrection, and the Mission of the Church*. New York: HarperOne, 2008.
- Tetsunao Yamamori and C. René Padilla, eds. *The Local Church, Agent of Transformation*. Buenos Aires: Kairos, 2004.

*Leadership and Change*

- Ichak Adizes, *Corporate LifeCycles*. Englewood Cliffs, NJ: Prentice-Hall, 1988
- Dean Anderson and Linda Ackerman, *Beyond Change Management*. San Francisco: Jossey-Bass/Pfeiffer, 2001.
- \_\_\_\_\_, *The Change Leader's Roadmap*. San Francisco: Jossey-Bass/Pfeiffer, 2001.
- Lille R. Brock and Mary Ann Salerno, *The Secret to Getting Through Life's Difficult Changes*. Washington, DC: Bridge Builder Media, 1994.
- Dee Hock, *Birth of the Chaordic Age*. San Francisco: Berrett-Koehler, 1999.
- Ronald A. Heifetz, *Leadership Without Easy Answers*. Cambridge, MA: Belknap Press of Harvard University Press, 1994.
- Peggy Holman and Tom Devane, eds., *The Change Handbook: Group Methods for Shaping the Future*. San Francisco: Berrett-Koehler, 1999.
- Robert Kegan and Lisa Laskow Lahey, *How the Way We Talk Can Change The Way We Work*. San Francisco: Jossey-Bass, 2001.
- John P. Kotter, *Leading Change*. Boston, MA: Harvard Business School Press, 1996.

- \_\_\_\_\_ and Holger Rathgeber, *Our Iceberg Is Melting: Changing and Succeeding Under Any Conditions*. New York: St. Martin's Press, 2005.
- Rick Maurer, *Beyond the Wall of Resistance: Unconventional strategies that build support for change*. Austin, TX: Bard Books, 1996.
- David M. Noer, *Breaking Free: A Prescription for Personal and Organizational Change*. San Francisco: Jossey-Bass, 1997.
- Robert E. Quinn, *Deep Change: Discovering the Leader Within*. San Francisco: Jossey-Bass, 1996.
- \_\_\_\_\_, *Change the World: How Ordinary People Can Accomplish Extraordinary Results*. San Francisco: Jossey-Bass, 2000.
- \_\_\_\_\_, *Building the Bridge As You Walk On It: A Guide for Leading Change*. San Francisco: Jossey-Bass, 2004.
- Edwin E. Olson and Glenda H. Eoyang, *Facilitating Organizational Change: Lessons from Complexity Science*. San Francisco: Jossey-Bass/Pfeiffer, 2001.
- Roxburgh Alan J. and Fred Romanuk, *The Missional Leader: Equipping Your Church to Reach a Changing World*. San Francisco: Jossey-Bass, 2006.
- Senge, Peter M. *The Fifth Discipline: The Art and Practice of the Learning Organization*. New York: Doubleday Currency, 1990.
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- Schein, Edgar H. *Process Consultation: Lessons for Managers and Consultants Vol. II*. Reading MA: Addison-Wesley, 1987.
- \_\_\_\_\_, *The Corporate Culture Survival Guide: Sense and Nonsense About Culture Change*. San Francisco: Jossey-Bass, 1999.
- \_\_\_\_\_, *Organizational Culture and Leadership*. 3<sup>rd</sup> Ed. San Francisco: Jossey-Bass, 2004.
- Saarinen, Martin F. *The Life-Cycle of a Congregation*. Washington, D.C.: The Alban Institute, 1986.
- Stacey, Ralph D. *Managing the Unknowable: Strategic Boundaries Between Order and Chaos in Organizations*. San Francisco: Jossey-Bass, 1992.
- Youngblood, Mark D. *Life at the Edge of Chaos: Creating the Quantum Organization*. Dallas, TX: Perceval Publishing, 1997.

#### *Assessment/Strategic Planning*

- Nancy T. Ammerman, Jackson W. Carroll, Carl S. Dudley, and William McKinney, *Studying Congregations: A New Handbook*. Nashville: Abingdon Press, 1998.
- Allison, Michael and Jude Kaye, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*. Hoboken, NJ: John Wiley & Sons, 2005.
- Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations*. San Francisco: Jossey-Bass, 2004.
- \_\_\_\_\_ and Farnum K. Alston, *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations*. San Francisco: John Wiley & Sons, 2008.
- Dees, J. Gregory Jed Emerson, Peter Economy, *Strategic Tools for Social Entrepreneurs: Enhancing the Performance of Your Enterprising Nonprofit*. New York: John Wiley, 2002.
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- Horan, Jim and Tom Peters, *The One Page Business Plan*. The One Page Business Plan Company, 2004.
- Mager, Robert F. *Goal Analysis: How to clarify your goals so you can actually achieve them*. Atlanta, GA: The Center for Effective Performance (any edition).

#### *Appreciative Inquiry*

- Branson, Mark Lau. *Memories, Hopes, and Conversations: Appreciative Inquiry and Congregational Change*. Herndon, VA: Alban Institute, 2004.

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- Whitney, Diana, David Cooperrider, Amanda Trosten-Bloom, and Brian S. Kaplin, *Encyclopedia of Positive Questions*. Euclid, OH: Lakeshore Communications, 2002.

#### *Culture and Diversity*

- Anderson, David A. *Multicultural Ministry: Finding your church's unique rhythm*. Grand Rapids: Zondervan Books, 2004.
- Battle, Michael. *Practicing Reconciliation in a Violent World*. Harrisburg, PA: Morehouse, 2005.
- Berger, Peter and Thomas Luckman, *The Social Construction of Reality*. Garden City, NY: Doubleday and Co., 1966.
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