

Assemblies of God Theological Seminary
Doctor of Ministry Program
PTH 971: Strategic Planning
October 7-11, 2002

Instructor: Roger Heuser, Ph.D.
55 Fair Drive
Costa Mesa, CA 92626
714 556-3610
rheuser@vanguard.edu

COURSE OUTLINE

I. OVERVIEW

An examination of change within congregations and religious organizations with a view toward understanding systemically the relationship between the organization and its environment. Strategic planning processes – especially marketing and appreciative inquiry -- problem solving, and program evaluation models will be explored in light of intentional mission and ministry.

This is a course on ministry planning in which change theory will be introduced as a basic building block supporting the planning process. Whereas planning deals more specifically with organizational mission, environmental realities, resources, problems and goals, change theory pays more attention to these issues as well as human and the structural dynamics that inform and influence the planning process and its results.

All planning implies that some change will result. However, many church planners fail to take this into account, and are disillusioned when they find their well-made plans are resisted because people have not been prepared for change.

II. COURSE OBJECTIVES

Regarding change theory, the student will:

1. develop a theology and spirituality of change;
2. assess one's own progress of personal change as described by Brock and Salerno's change cycle;
3. explore how the external relationship with environment can help or hinder the organization's future effectiveness;
4. examine how internal belief systems and organization structures of organizational design contribute and/or resist change;
5. understand the following change theorists: Lewin, Heifitz, Maurer, Kotter, Drucker and Senge;
6. examine Quinn's four perspectives on change theory -- technical reality, political reality, interpersonal reality and transformational reality – their perspective strategies and their relationship with each other; and
7. understand the practical issues in application of change theory to inform strategic planning.

Regarding strategic planning, the student will:

1. develop and theology and spirituality of planning;
2. examine Drucker's approach to organization self-assessment;
3. explore the relationship of spirituality and vision;
4. explore the relationship between the system and its environment and how this relationship impacts strategic thinking; and
5. explore several strategic planning models but emphasizing the marketing approach and appreciative inquiry.

III. COURSE REQUIREMENTS

1. Pre-Session Assignments

- a. Before you do any reading, sit down and write a statement (2-4 pages) that expresses your theology of change. What insights do you gain from scriptures about change? What important lessons do Scripture change stories teach you about God, human nature, and ministry in relation to change? What do you truly believe about change – your assumptions, values, or beliefs?
- b. Read Brock and Solerno and complete the personal change cycle that accompanies their book.
- c. Write a book critique (total 3-5 pages) of the following texts: Shawchuck & Heuser; Quinn; and Mead. Highlight what connected with you, what did not connect with you, and what is puzzling about the reading in terms of conceptual understanding or application?
- d. Write a case study (3-5 pages) that describes planning processes you have been involved with and then evaluate the process in light of Drucker's Self-Assessment model and Shawchuck, et. al.'s model of marketing/ planning.

Note: If you do not complete pre-session assignments before class, you will be required to take a final examination in addition to the assignments.

2. **Post-session assignment (20-30 pages).** 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. The project should include the following:
 - a. Introduction/statement of strategic planning need and the particular setting
 - b. Statement of purpose and goals for this project
 - c. Definition of terms
 - d. Brief literature review that includes: theology of change, change theory and strategic planning approaches
 - e. Describe method for strategic planning in specific setting that may include such items as follows:
 - i. Choice of strategic planning process and rationale
 - ii. Description of specific strategic planning process

- iii. Will you use a particular task force for strategic planning? Or, will you work in existing structures?
- iv. What is the time line?
- v. What resources are needed?
- vi. Who is accountable for steps?
- f. Evaluation process identified
 - i. What evaluation design will you use -- qualitative and/or quantitative data analysis?
- g. Appendices (instruments, interview questions, data obtained or will be obtained (e.g, census, external and internal demographics)

IV. COURSE REQUIREMENTS AND GRADES

Attendance, reading assignments, pre-session assignments, and post-session assignments contribute to a final grade for this course.

Pre-session assignments	50%
Post-session course project	50%

V. COURSE OUTLINE

Change Theory

1. Drafting a theology and spirituality of change
2. Assessing one's own progress of personal change as described by Brock and Salerno's change cycle
3. Exploring how the external relationship with environment can help or hinder the organization's future effectiveness
4. Examining how internal belief systems and organization structures of organizational design contribute and/or resist change
5. Understanding the following change theorists: Lewin, Heifitz, Maurer, Kotter, Drucker and Senge
6. Examining Quinn's four perspectives on change theory -- technical reality, political reality, interpersonal reality and transformational reality -- their perspective strategies and their relationship with each other

Strategic Planning

1. Developing a theology and spirituality of planning
2. Examining Drucker's approach to organization self-assessment
3. Exploring the relationship of spirituality and vision
4. Exploring the relationship between the system and its environment and how this relationship impacts strategic thinking
5. Examining major steps in strategic planning and, more specifically, appreciative inquiry and marketing as two strategic planning processes

VI. COURSE READING

Required Texts in suggested order of reading

- Norman Shawchuck and Roger Heuser, *Managing the Congregation: Building Effective Systems to Serve People*. Nashville: Abingdon Press, 1996. 358 pages
- Loren B. Mead, *Five Challenges, for the Once and Future Church*. Bethesda, MD: Alban Institute, 1996. 89 pages
- Brock, Lillie R. and Mary Ann Salerno. *The Secret to Getting Through Life's Difficult Changes*. Washington D.C.: Bridge Builder Media, 1994. 184 pages
- Quinn, Robert E. *Change the World: How Ordinary People Can Accomplish Extraordinary Results*. San Francisco: Jossey-Bass, 2000. 256 pages
- Charles Elliott, *Strategic Planning for Churches: An Appreciative Approach*. Matthews, NC: CMR Press, 1997. 113 pages
- _____, *Training Workbook. Strategic Planning for Churches: An Appreciative Approach*. Matthews, NC: CMR Press, 1997. 28 pages
- Jane Margruder Watkins and Bernard J. Mohr, *Appreciative Inquiry: Change at the Speed of Imagination*. San Francisco: Jossey-Bass/Pfeiffer, A Wiley Company, 2001. 209 pages
- Drucker, Peter F. *The Drucker Foundation Self-Assessment Tool: Participant Workbook*. San Francisco: Jossey-Bass, 1999. 61 pages
- Shawchuck, Norman, Philip Kotler, Bruce Wrenn, and Gustave Rath. *Marketing for Congregations: Choosing to Serve People More Effectively*. Nashville: Abingdon Press, 1992. 403 pages

NOTE: If you have already read any of the required texts, choose options from the additional reading list below.

Style Guides

- Alexander, Patrick H. *The SBL Handbook of Style: For Ancient Near Eastern, Biblical, and Early Christian Studies*. Peabody, MA: Hendrickson Publishers, 1999.
- Turabian, Kate L. *A Manual for Writers of Term Papers, Theses, and Dissertations*. 6th ed. Chicago: University of Chicago Press, 1996.

NOTE: Turabian is the only style guide accepted for this class. Use it for all written work submitted to faculty, including book critiques.

Other helps for writing papers

- Adler, Mortimer J. and Charles Van Doren *How To Read a Book*. New York: Simon & Schuster, Inc., 1972.
- Booth, Wayne C., Gregory G. Colomb and Joseph M. Williams. *The Craft of Research*. Chicago: University of Chicago Press, 1995.
- Core, Deborah. *The Seminary Student Writes*. St. Louis, MO: Chalice Press, 2000.
- Hagberg, Janet O. *Wrestling with Your Angels: A Spiritual Journey To Great Writing*. Holbrook, MA: Adams Publishing, 1995.

Additional Reading

- Cooperrider, David L., Sorensen, Peter F., Jr., Whitney, Diana, and Yaeger, Therese F. *Appreciative Inquiry: Rethinking Human Organization Toward a Positive Theory of Change*. Champaign, IL: Stipes Publishing, 2000.
- Elliott, Charles. *Locating the Energy for Change: An Introduction to Appreciative Inquiry*. Canada: International Institute for Sustainable Development, 1999.
- Heifetz, Ronald A. *Leadership Without Easy Answers*. Cambridge, MA: Belknap Press of Harvard University Press, 1994.
- Hock, Dee. *Birth of the Chaordic Age*. San Francisco: Berrett-Koehler, 1999.
- Kotter, John P. *Leading Change*. Boston, MA: Harvard Business School Press, 1996.
- Lindgren, Alvin J. and Norman Shawchuck, *Let My People Go*. Leith, ND: Spiritual Growth Resources, 1988.
- Luecke, Richard. *Scuttle Your Ships Before Advancing: And Other Lessons from History on Leadership and Change for Today's Managers*. New York: Oxford University Press, 1994.
- Maurer, Rick. *Beyond the Wall of Resistance*. Austin, TX: Bard Books, Inc., 1996.
- Hammond, Sue Annis. *The Thin Book of Appreciative Inquiry*. Plano, TX: Thin Book Publishing Co., 1998.
- Mead, Loren. *The Once and Future Church*. Bethesda, MD: Alban Institute, 1991.
- _____. *More Than Numbers*. Bethesda, MD: Alban Institute, 1993.
- _____. *Transforming Congregations for the Future*. Bethesda, MD: Alban Institute, 1994.
- _____. *Five Challenges for the Once and Future Church*. Bethesda, MD: Alban Institute, 1996.
- Perry, Lloyd M. and Norman Shawchuck, *Revitalizing the 20th Century Church*. Leith, ND: Spiritual Growth Resources, 1986.
- Quinn, Robert, *Deep Change: Discovering the Leader Within*. San Francisco: Jossey-Bass, 1996.
- Rath, Gustave and Norman Shawchuck, *Benchmarks of Quality in the Church*. Leith, ND: Spiritual Growth Resources, 1994.
- James H. Rutz, *The Open Church: How to Bring Back the Exciting Life of the First Century Church*. Sargent, GA: SeedSowers, 1992.
- Senge, Peter M. *The Fifth Discipline: The Art and Practice of the Learning Organization*. New York: Doubleday Currency, 1990.
- Smith, Chuck Jr. *The End of the World As We Know It*. Colorado Springs: Waterbrook Press, 2001.
- Schaller, Lyle. *Strategies for Change*. Nashville: Abingdon Press, 1993.
- Schein, Edgar H. *Process Consultation: Lessons for Managers and Consultants Vol. II*. Reading MA: Addison-Wesley, 1987.
- Saarinen, Martin F. *The Life-Cycle of a Congregation*. Washington, D.C.: The Alban Institute, 1986.
- Srivasta, Suresh and Cooperrider, David L. *Appreciative Management and Leadership*. Euclid, OH: Williams Custom Publishing, 1999.
- Stacey, Ralph D. *Managing the Unknowable: Strategic Boundaries Between Order and Chaos in Organizations*. San Francisco, CA: Jossey-Bass Publishers, 1992.
- Sweet, Leonard. *AquaChurch: Essential Leadership Arts for Piloting Your Church in Today's Fluid Culture*. Loveland, CO: Group, 1999.
- Zohar, Danah. *ReWiring the Corporate Brain*. San Francisco: Berrett-Koehler Publishers, 1997.