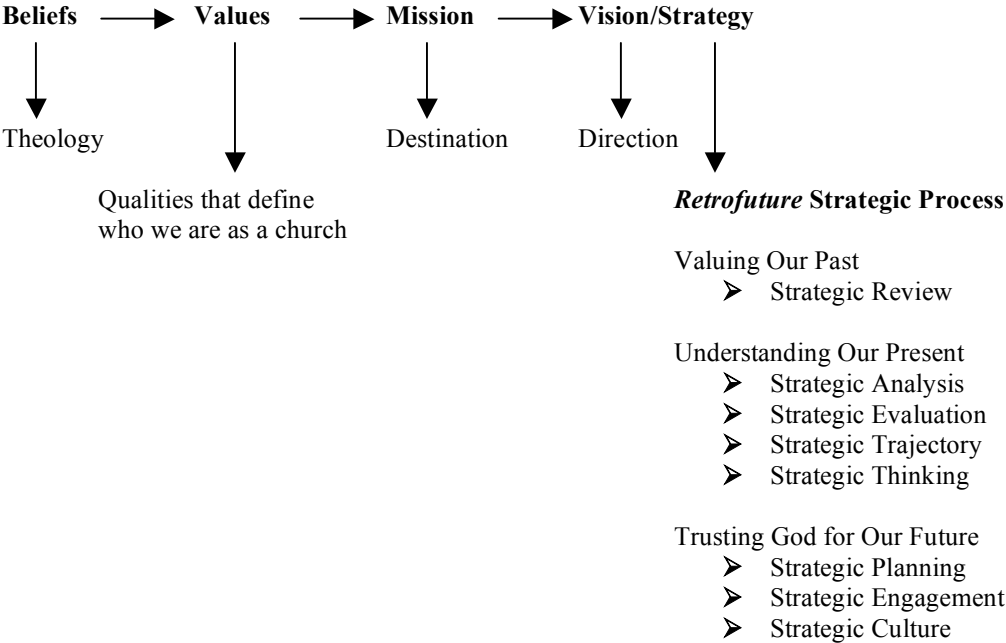


# Retrofuture Strategic Process

## Strategic Process Overview



## *Retrofuture Strategic Process*

### **Past**



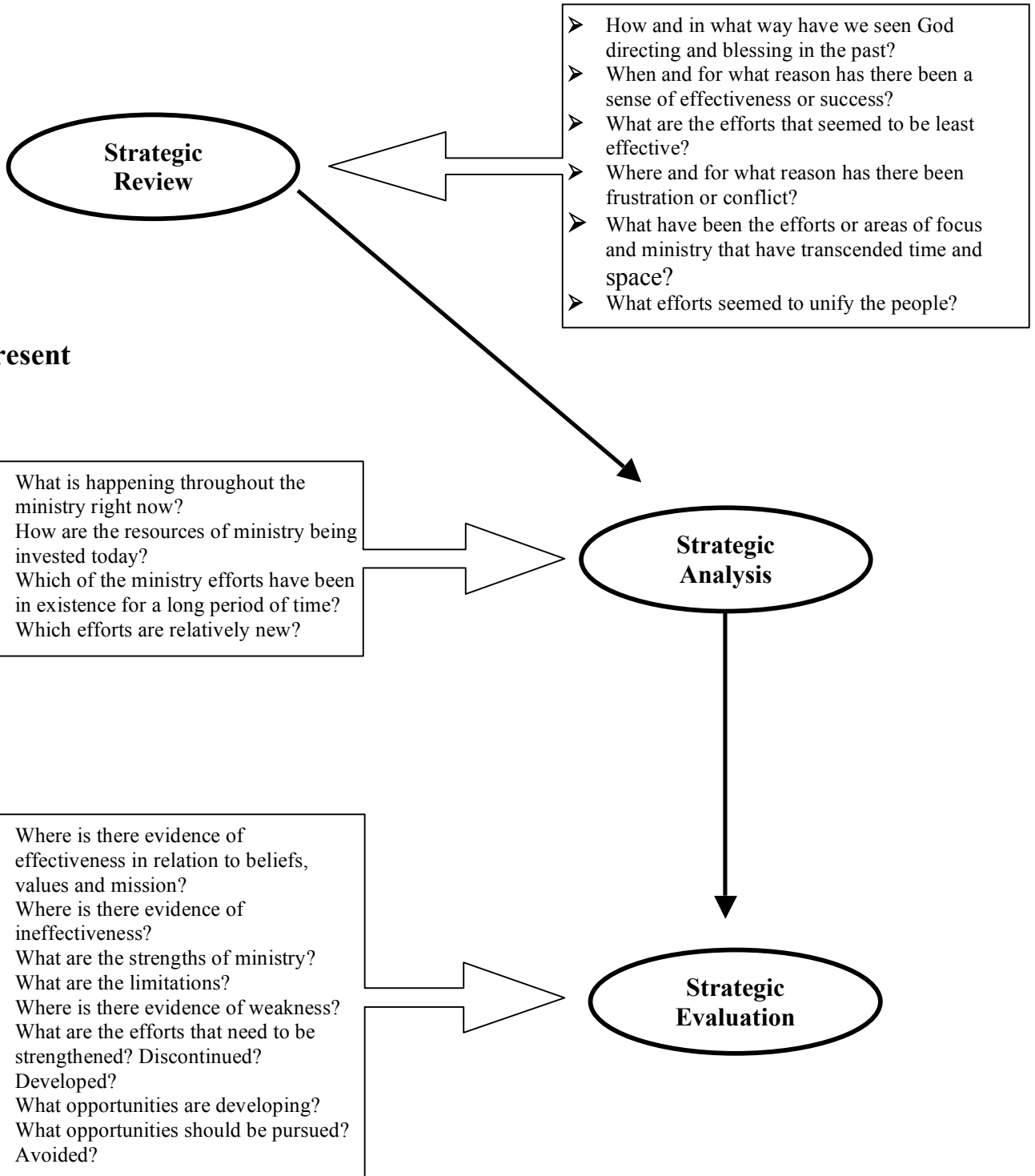
- How and in what way have we seen God directing and blessing in the past?
- When and for what reason has there been a sense of effectiveness or success?
- What are the efforts that seemed to be least effective?
- Where and for what reason has there been frustration or conflict?
- What have been the efforts or areas of focus and ministry that have transcended time and space?
- What efforts seemed to unify the people?

### **Present**

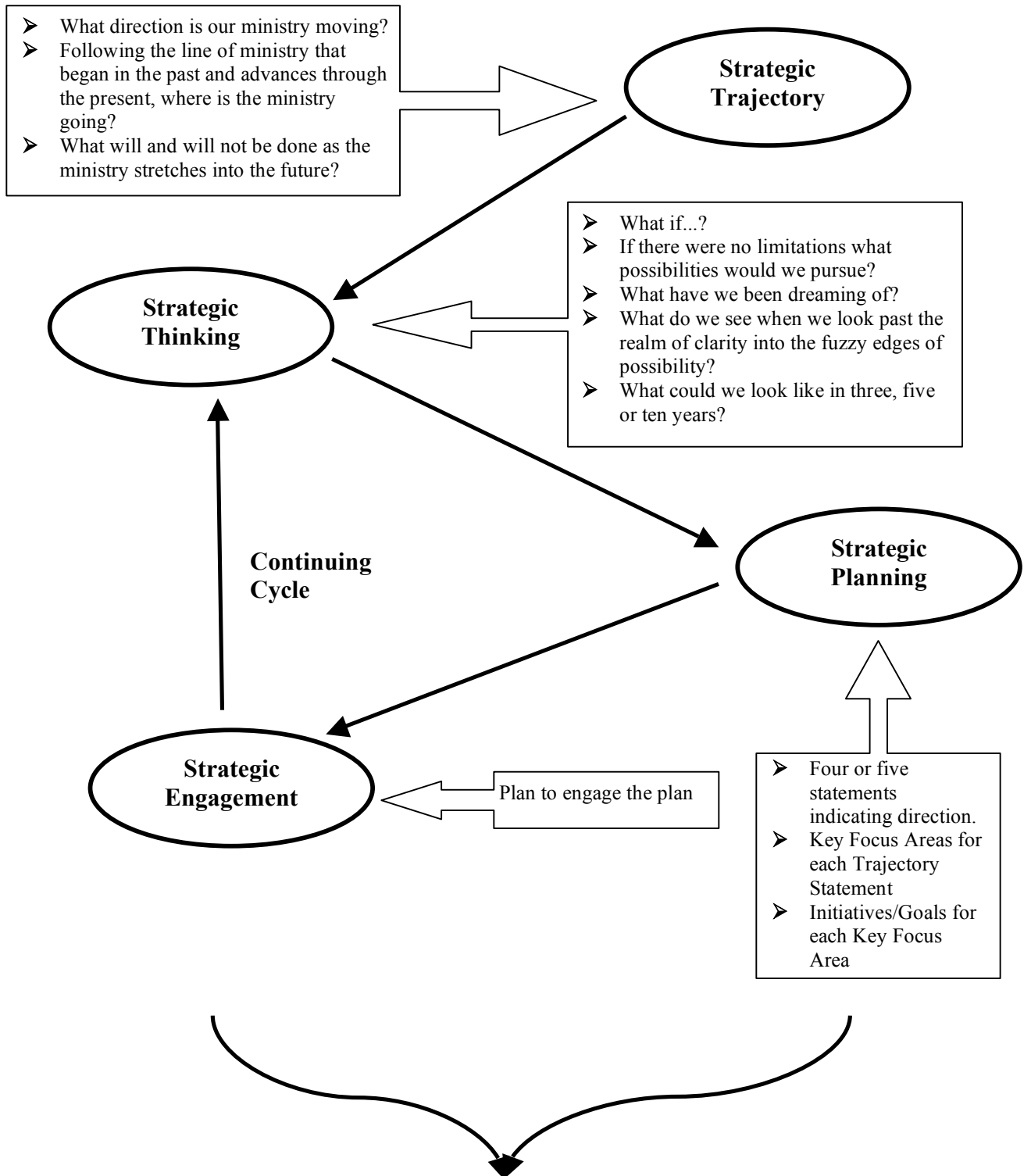
- What is happening throughout the ministry right now?
- How are the resources of ministry being invested today?
- Which of the ministry efforts have been in existence for a long period of time?
- Which efforts are relatively new?



- Where is there evidence of effectiveness in relation to beliefs, values and mission?
- Where is there evidence of ineffectiveness?
- What are the strengths of ministry?
- What are the limitations?
- Where is there evidence of weakness?
- What are the efforts that need to be strengthened? Discontinued? Developed?
- What opportunities are developing?
- What opportunities should be pursued? Avoided?



## Future



## Strategic Culture

### Tendencies to be Avoided

1. Isolating elements of the sequence
2. Rushing the process or omitting elements
  - Review is faster than development
  - Vision without Mission – direction doesn't matter; lots of activity with little accomplishment
  - Mission without Beliefs – results in a social organization
3. Change of sequence order
4. Treating the process as an occasional event in the life of the ministry/organization
5. Lack of ownership and accountability
6. Ending with planning
  - Without engagement the plan doesn't matter
7. Confusing the Strategic Plan with the Operational Plan
8. Seeking to have a finalized or completed plan
  - Strategic Plan is fluid, adapting, growing

### Perspective

At the outset of this effort it is to be understood that there is no universally effective strategic process. Every effort is a modification of understanding and presuppositions molded into a contextually sensitive model that is designed to advance the mission of the ministry or organization. Likewise, it is a collaborative effort that brings together the passions, convictions, beliefs and thinking of many constituent groups, each of which have a vested interest in the ministry. Further it is to be understood that any effective strategic process is perpetual in nature and while some elements are engaged periodically, others are to be ongoing. In other words, a strategic process that has value and influence is continually evolving, building on the efforts of the past and reaching into the future. As Daniel Alshire of the Association of Theological Schools suggests, all learning and educational developments of today are built on the education and learning experienced in the past; all scientific discovery, all medical advancements, all theological understanding, all strategic planning builds on what past generations have grown to know, believe and do. From this perspective it is suggested that although there is to be a degree of process fluidity and contextualization, a design that is fundamentally retrofuture is most relevant and effective.

By design, a strategic process that is retrofuture steps into the past and seeks to envision the future by looking through the lens of history. This is not about looking backward, rather it is about allowing the past to give clarity as we focus on the future. In the way the present is understood in relation to the past and the future is anticipated by viewing the trajectory development. With this in mind the strategic process focuses on three periods of ministry development: past, present and future.

### Past Picture

#### Strategic Review

Looking forward from the perspective of today, one gains a perspective that is somewhat limited. Stepping into the past and looking forward through the years gone by a whole new view is achieved. From the past one sees the trajectory of what God has been doing and anticipates where God is leading. Before anticipation there must be understanding; before gazing into the future one must peer into the past. One cannot know where you are going without first having a good understanding of where you have come from and where you are now.

“Those who cannot remember the past are condemned to repeat it” – George Santayana

“Leaders must take an active interest in the history of their organization. There are valuable lessons to be learned that can save time and energy. To neglect these clues from the past is shortsighted and will only come to haunt the leaders. Not knowing the lessons from the past also compromises the leaders credibility with his people, many may have actually lived through some of the events” (Chris Brady & Orrin Woodward. *Launching a Leadership Revolution*. p 125).

The effort to look ahead through the past is dependent on the view of those who have been here in the past, those who have first-hand memory of what was happening in and through the ministry during its decades of life. The strategic review is an effort to hear and listen, to understand the passions and dreams, to feel the excitement and the pain.

This strategic review may have a number of elements, including: interviews with ministry originators, interviews with constituent supporters, review of archives and historical records. This review is designed to produce more than a brief historical narrative made up of anecdotal observations. Rather the result must be a comprehensive understanding of how the ministry was founded, how it developed, how challenges were faced and opportunities were embraced. In this the trajectory of ministry progress becomes clear as repeated themes are identified and fundamental principles are clarified.

The Strategic Review seeks to ask and answer a number of questions, including:

- How and in what way have we seen God directing and blessing in the past?
- When and for what reason has there been a sense of effectiveness or success?
- What are the efforts that seemed to be least effective?
- Where and for what reason has there been frustration or conflict?
- What have been the efforts or areas of focus and ministry that have transcended time and space?
- What efforts seemed to unify the people?

## **Present Picture**

### **Strategic Analysis**

Turning from the past to the present, the strategic process focuses on the present condition of the institution through a sequence of in-depth audits, including: facilities, finances, personnel, curriculum (formal, informal, non-formal), environmental (external), environmental (internal), constituent support, participant demographics (student), services, partnerships, recruitment (enrollment management), operational, and procedural etc.

The strategic analysis also directs attention to a review of institutional values and mission. The concern at this point is not the existence of values and mission but function and engagement, language and relevance, clarity and consensus.

Since the analysis portion of the process does not assign value, the issue of concern is to simply know and understand what is happening; this is a snapshot of the present reality. Here relatively few questions are asked, yet the answers reveal a great deal. Questions may include:

- What is happening throughout the ministry right now?
- How are the resources of ministry being invested today?
- Which of the ministry efforts have been in existence for a long period of time?
- Which efforts are relatively new?

### **Strategic Evaluation**

Whereas the strategic review of the past and strategic analysis of the present seek to paint an objective picture of what was and what is, the strategic evaluation seeks to give meaning and value to each. Here the effort begins to give direction to the process by clarifying strengths, weaknesses, limitations and opportunities. Likewise, it is here that the trajectory of institutional progress identified in the strategic

review may also be seen in present initiatives and conditions. There is also a tendency to move too quickly to the planning step of the process, yet without evaluation there is a lack of clarity as to direction. This institutional tendency is similar to that which Bob Logan and Sherilyn Carlton speak of in the reflection phase of the Coaching Process. As they point out, “The biggest temptation during the reflection phase is to jump forward to next steps before taking adequate time to evaluate what has already taken place” (Robert E. Logan and Sherilyn Carlton. *Coaching 101*. St Charles: ChurchSmart, p 52-3).

This is the time to ask questions of effectiveness and improvement. “Without measurement there can be no portrayal of reality. Without data representing reality, there can be no impetus or plan for improvement” (Chris Brady & Orrin Woodward. *Launching a Leadership Revolution*. p 183).

Questions may include:

- Where is there evidence of effectiveness in relation to beliefs, values and mission?
- Where is there evidence of ineffectiveness?
- What are the strengths of ministry?
- What are the limitations?
- Where is there evidence of weakness?
- What are the efforts that need to be strengthened? Discontinued? Developed?
- What opportunities are developing?
- What opportunities should be pursued? Avoided?

“Leaders have watchful eyes. They scan the world for emerging opportunities all the time... This is where the ability to assess and take risks and the ability to prioritize become critical. It is imperative that organizations take advantage of new opportunities, but not every opportunity” (Chris Brady & Orrin Woodward. *Launching a Leadership Revolution*. p 76).

### **Strategic Thinking**

Unlike the previous steps in the process that seek objectivity, strategic thinking seeks to be imaginative and creative. This is not a point of decision; rather the intent is to get dreams and ideas into the open. Without conclusion or criticism, strategic thinking moves from what is to what might be, from objective to subjective, from real to hypothetical.

While the temptation is to move too quickly from evaluation to planning, the strategic thinking step seeks to engage creativity, avoid mere replication and challenge assumptions. Here the hope is to not find one answer to questions raised, but many, and to open minds and hearts to what might be. Here the trajectory is pushed forward to new levels of possibility.

It is important to remember that if all we see is what we have already seen we will only do what we have already done. Here we are reminded that the definition of insanity is to continue doing the same thing and expecting different results (James B. Richards *The Lost Art of Leadership*, Huntsville: Milestones 2005, p vi). Thinking is about dreaming, about creativity, about imagination. Here the goal is not to think normal, not to think small, not to take ourselves too seriously.

Questions may include:

- What if...?
- If there were no limitations what possibilities would we pursue?
- What have we been dreaming of?
- What do we see when we look past the realm of clarity into the fuzzy edges of possibility?
- What could we look like in three, five or ten years?

### **Strategic Trajectories**

Having worked through the process of understanding the past and seeing the trajectory of effectiveness, and having spent time thinking strategically, pushing one’s mind out to the fuzzy edges of possibility, the temptation is to move into planning. However there remains one additional step that must be engaged in order to facilitate effective planning. Before planning, it is necessary to formulate strategic trajectory

statements. These become strategically defining statements that indicate the width and breadth of possibilities. Since strategic planning follows the development of beliefs and values, a trajectory statement may be: *We will embrace and pursue all possibilities that do not conflict with or hinder our beliefs and core values.* Because strategic planning follows the strategic review, a trajectory statement may read: *We will hold to and advance the defining characteristics of the conference.*

Strategic trajectory statements define what will be done, what will not be done and what could be done in general terms. They represent the edges of the canvas upon which the preferred picture will be painted; they provide depth and direction for the movement into the future.

## **Preferred Picture**

### **Strategic Planning**

Several observations about strategic planning are in order, including:

Strategic planning is...

- ...part of a process rather than an isolated effort
- ... an expression of beliefs and convictions
- ...a reflection of values and personality characteristics
- ...the context in which mission becomes uniquely expressed, understood and engaged
- ...engaged in a point in time but is not about that time, it is about the past and the future
- ...an expression of the desire for something different, something better, something more
- ...about listening to God
- ...an effort to put into words what we hear God saying and where we believe God is pointing us

Having moved from the past to the present, from the objective to the subjective, and from the narrow to the broad, the strategic planning step in the process moves from the general to the specific. From the range of creative ideas previously expressed, the planning process seeks to advance the trajectory of progress in keeping with beliefs, values and mission in response to opportunities and stewardship.

At this point it is necessary to emphasize the perpetual nature of strategic planning. Just as the process is not a static 'one-size-fits-all' paradigm, so the planning stage is not a one-time effort. Rather strategic planning is alive, dynamic, fluid and unfinished, always moving toward mission fulfillment but never experiencing complete achievement. Here strategies are identified, tasks and time assigned, achievement measured, and progress celebrated.

This move from general to specific seeks to honour the past by build upon the defining characteristics and strategic initiatives while projecting ministry movement and advancement into the future. The planning template is as follows:

**Trajectory Statements** – Five to six general statements that define the broad direction and movement into the future.

**Key Focus Areas (Strategic Categories)** – Following each Trajectory Statement intrinsic categories are defined. Here the planners begin to identify the interconnected key focus areas within the ministry. The temptation may be to identify departments rather than key focus areas. For example, one may be tempted to identify missions as a department rather than mission as a key focus of attention that will run throughout departments; or one could identify communications as a department or communications as a dynamic that affects all departments.

**Initiatives (Goals)** – Having defined the Key Focus Areas, the planners move to identify specific initiatives that will be engaged in an effort to advance the trajectory of ministry. These statements may be stated in the form of traditional goals (SMART), or they may be more intentional in nature with the understanding that as an Operational Plan is developed, more measurable statements will be constructed.

Here too, the planners will make an effort to date and assign the initiatives for the sake of follow-through and accountability.

### **Strategic Engagement**

While already reflected in the statement above, it is important to emphasize the engagement part of the strategic process for it is here that many such efforts fall short and fail. Until the plan is engaged all strategies remain hypothetical. On the other hand, engagement means that what has been decided in the plan will also be monitored and accountability enforced. Clearly it is not enough to have a strategic process and a strategic plan; there is only value in engagement.

Addressing the issue of engagement, Lawrence Hrebiniak (*Making Strategy Work*) states clearly that when it comes to strategy the key to success is execution or engagement, and yet it is here that many efforts fail. He goes on, initially in the first chapter and then throughout the book, to identify and address the hindrances to engagement and success. They include;

1. Lack of a disciplined process and dedication to the hard work of strategic engagement
2. Lack of training in execution
3. Delegating execution, particularly to those who have not been involved in developing the plan
4. Separating planning and execution or not planning the execution
5. Not allowing adequate time for engagement
6. Treating execution as a step rather than a process
7. Not involving a sufficient number of people in the engagement process

(Adapted from: Lawrence Hrebiniak. *Making Strategy Work*, 2005)

Engagement also presupposes the necessity of plan adjustment and allows for alterations in specific efforts while remaining true to the direction and intent of the plan. It is also at this point that the process becomes cyclical in nature, moving from engagement to evaluation to modification to engagement while making progress toward mission fulfillment.

### **Strategic Culture**

In order for a strategic process to have the desired and necessary impact, the very nature of the institution must be strategically characterized. This is not a process to be engaged merely at times of transition, crisis or change, rather it is to be reflected throughout the very form and function of the institution. It then is the responsibility of leadership to keep the strategic process in the forefront of institutional function, to repeatedly tell the story of the institution, to regularly analyse and evaluate, to give dedicated time to strategic thinking, to plan, to engage, to monitor, adjust, and engage again. While effectiveness of the process is also dependent on a wide range of participation, it is the board who must own the process. The board may delegate and assign tasks but can never be relieved of its responsibility for the process. The plan itself is not an edict handed down; rather it is the result of specific steps in a uniquely designed process that is engaged with collaboration toward a mutually agreed mission.