Strategic, Whole Systems Planning for Congregations and Religious Organizations; Aligning Strategy and Spirit (AM-618)

January 13-17, 2014 (9:00 a.m. -5:30 p.m.)

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Course Description:

Leading and planning in congregations, religious and other organizations these days requires resilient strategy and resilient spirit.

This course focuses on participatory practices of leading and planning that build upon an organization’s strengths, responds to its unique challenges and the broader social, economic, cultural, spiritual and ecological challenges that we all face. We will draw on an overarching model of engaging the “whole system” and help you to understand how you might design engagement process within your own present or future context. We will engage in the perspectives and practices of Theory U, Future Search, Appreciative Inquiry, Open Space, World Café, Spiritual Discernment, Asset-mapping and Scenario Planning. We will also explore how you might use these methodologies in your on-going work of leading and planning within organizations or on a particular project.

This course includes a collaborative inquiry into the unique contributions and innovations that religious and other organizations and their leaders can make to the Common Good. We will engage in the inquiry about the inner shifts in our own leading as well as the innovations in organizations that will enable us to “lead from an emerging future.”

Course Objectives:

Students will be able to:

1. Clarify the holistic context and the changing landscape for religious and other organizations that inform the need for strategic thinking, resilience and “leading from an emerging future.”
2. Make the distinctions and utilize the differences between these concepts: strategic thinking and strategic planning, strategy and goals, functional and visionary, technical problems and adaptive challenges, ego-system and eco-systems, participative and whole systems approaches, deciding and discerning.
3. Understand the core phases of the participative strategic planning process the specific methods that can be used in each.
5. Integrate their learning through imagining how they might apply these perspectives and methods to a possible planning project within an organization, project or program.

Methods of Course Assessment:

Grades will be based on attendance, participation in class discussion, and completion of written assignments. Please note: attendance policy below.

Written Assignment:

1. Daily Journal writing for each class session. This will be a way for you to capture your learning and the implications of your learning along the way during an intensive course week. These reflections can draw upon the readings, the reflection questions offered in class, or class discussions. Suggested length 2 typed, double-spaced pages per day. The journals are due February 15, 2014 (This will count for 35% of the grade.)

2. A final paper that integrates the perspectives that you have gained from the readings, course discussions and journal writing. This paper demonstrates your understanding of the perspectives that inform your approach and the practices that you could use in a real or possible future organization strategic planning project. Suggested length 15 pages. Due March 15, 2014. (Will count for 40% of the grade)

3. Class participation: preparation and engagement within the class discussions and activities. (This will count for 25% of the grade.)

Attendance Policy:

Attendance in class is required. If you know you will be unable to attend a class session please inform the professor in advance. Because of the intensive nature of this course, the policy is that failure to be in attendance one and a half day for any reason will result in automatic failure of the course.

**Assignment in Preparation for the First Class Session:**

Please note that there is an expectation that this pre-work will have been completed before the first class. Given the intensive nature of the course, this pre-work will allow us to engage fully from day one in the collaborative inquiry, discussions and activities planned for Session One.

1. Read the Introduction (pp. xi-xxvi) and chapters 1-4 (pp. 1-70) in Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations, by Gil Rendle and Alice Mann, Alban Institute, 2003.

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1 Please note you are not being asked to actually do this project but to write about a project that you could possibly do to integrate what you’ve learned in the course. We’ll discuss this more in the course.

** Decide what way you are going to access one of the required texts used during the week of the course, The Change Handbook. The cost for a hard copy is approximately $60 new on Amazon or it is also available to read on a scribd.com account (You may use a free 30 day trial subscription or a short term subscription, if you’d like). A copy of this text will also be on the reserve shelf in the library.

**Course Outline**

Monday, January 13, 2014, 9 am-12 pm; 1-5:30 pm

Theme: Why do we need to think—strategically? What Does this Mean?

Topics in class session one include:

1. Introductions:
   a. Of the course objectives, process and a collaborative inquiry process
   b. Of ourselves and our “context”
2. What?
   Some useful distinctions: strategic planning and strategic thinking; technical and adaptive challenges, “downloading from the past” and “leading from an emerging future,” etc.
3. Why?
   A broader social and religious context for strategic thinking and participatory methodologies. A FutureScape exercise.
4. How?
   b. Issues and practices in strategic planning
   c. Navigating the methods of participatory processes
   **5.** Beginning to sketch your own road map for a practice planning process

Assignments to prepare for Day 2:

1. Write about 2 pages in your journal
2. Read Chapter 1 (pages 1-7), Chapter 2 (9-16) and part of Chapter 3 (pages 17-29), Creating the Future Together by Loren Mead and Billie Alban, The Alban Institute, 2008

2 Note: See Pre-Reading Assignment before the first Session on page 2 and 3. Come prepare. d for the first session.
4. Read, “Leading from an Emerging Future: Minds for Change—Future of Global Development,” by Otto Scharmer. This is an article that will be made available in the reader for students on the first day.
5. Optional: Review the presencing.com website, Tools tab to become familiar with this perspective and methodology.

Tuesday, January 14, 2014  9 am-12 pm; 1-5:30 pm

**Theme: Designing a Process: Theory U and Future Search Conference**

Topics in class session two include:

1. Collaborative Inquiry: Resilience & : A Force Field Analysis
2. Theory U Process & Practices
   a. The Iceberg Model: Ecological, Social and Spiritual-Cultural Divides
   b. Principles of Presencing
   c. Habits of Absencing
   d. Engaging in Theory U
   e. Implications for your own leadership
3. Principles of Whole Systems and Participatory Approaches
4. The Future Search Conference:
   a. Designing a whole system in the room conference
   b. Reviewing the Past, Focus on the Present, Focus on the Future
   c. Planning around a Common Ground Vision Theme
2. Continuing to sketch your own road map for a practice planning process

**Assignments to prepare for Day 3:**

6. Write about 2 pages in your journal
7. Read Chapter 3 (only pages 29-33), *Creating the Future Together* by Loren Mead and Billie Alban, The Alban Institute, 2008)

Wednesday, January 15, 2014  9 am-12 pm; 1-5:30 pm

**Theme: Designing a Process II: Taking an Appreciative Approach**

Topics in class session three include:

1. Designing Participatory Processes
   a. Exploration, Commitment, Design, Engagement, Integration

3. The Perspective and Practices of Appreciative Inquiry:
   a. Discover, Dream, Design, Destiny
   b. Developing an Appreciative Interview
   c. Developing Provocative Propositions

4. SOAR: Building Strategy Based Strategy

5. Continuing to sketch your own road map for a practice planning process.

**Assignments to prepare for Day 4:**

1. Write up to 2 pages in your journal
2. Read, “The Art of Powerful Questions: Catalyzing Insight, Innovation, and Action” by Eric E. Vogt, Juanita Brown and David Isaacs. This is an article that will be made available in the reader for students on the first day.
5. Read Chapter 3 (only pages 33-40) and Chapter 4 (pages 41-81) in *Creating the Future Together* by Loren Mead and Billie Alban, The Alban Institute, 2008.
6. Optional: Review the website: www.artofhosting.org

**Thursday, January 16, 2014 9 am-12 pm; 1-5:30 pm**

**Theme: Crafting the Questions and the Art of Hosting Conversations**

Topics in class session four include:

1. Conversations that matter, Shifting Conversations
2. Acknowledging Obstacles to “presencing”
3. Designing discerning and significant questions
4. Art of Hosting: Perspectives and Practices
5. The World Café: Perspectives and Practices
6. Open Space: Perspectives and Practices
7. Continuing to sketch your own road map

**Assignments to prepare for Day 5:**

7. Write up to 2 pages in your journal
8. Write a 1 page description of your final paper to hand into the instructor
9. Read Chapter 5 in *Creating the Future Together* by Loren Mead and Billie Alban, The Alban Institute, 2008)
13. Read Chapter 11 (pp. 139-152) in Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations

Friday, January 17, 2014 9 am-12 pm; 1-5:30 pm

Theme: Crafting Actions & Innovations: Asset Mapping, Scenario Thinking and Pro-Action Café

Topics in class session five include:

1. Discernment: Stages in the process
2. Asset Mapping
3. Scenario Planning
4. From vision to action: Developing an Implementation Plan
5. Phases of innovation
6. Review of possible final paper topics
7. Cases

Required Reading for the Course:


** Please note that you have options for this text by Peggy Hoffman:

(1) You can purchase this book as a reference book of over 60 methods, even though we are using only 8 chapters in the book. The second edition of this book cost $60 new on Amazon. OR
(2) Most of you may want to access the book on scribd.com. You can get a free 30 day subscription and review the book on-line there, or buy a subscription for a monthly subscription rate (which can be cancelled at any time.) OR
(3) A copy will also be on the reserve shelf.

There will also be a reader of articles provided on the first day of class.
Resources for Further Reading and Research

The following books can be helpful to you in your research for your final paper, which may focus on one or more methods.

Congregations: Planning and Discernment


Whole System Planning Methods


Appreciative Inquiry


Open Space Technology
Owen, Harrison. Open Space The User’s Guide Berrett-Koehler Publishers, Inc. (also available as a PDF Download at bkconnection.com)


Theory U


Presencing Institute website: presencing.com

The World Café

Strategic Thinking

Graphic Facilitation Methods