



THE UNITING  
PRESBYTERIAN  
CHURCH  
IN SOUTHERN  
AFRICA

**STRATEGISING FOR THE FUTURE: STRATEGIC PLANNING FOR THE CONGREGATION**

**PRESENTATION TO THE INSPIRE CONFERENCE:  
"Growing and Going"**

**EMSENI CHRISTIAN CENTRE  
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GENERAL SECRETARY OF THE UPCSA**

# TASK

**How does a congregation plan, set goals and achieve them? How do we manage change? How do we get from here to there? What is the role of the vision, mission, goals, priorities, and values? How do we turn theory into reality?**

## WHAT IS A MISSIONAL CHURCH? UPCSA

A Missional Church is a **sent** Church, which understands its primary work as **witnessing** to Christ and **serving** God in the **world**.

A Missional Church is **shaped** by God **for** the community into which God has placed it. It is **focused** on those who don't yet know Jesus and on working **with** God in bringing **fullness of life** (involving justice, healing, wholeness and reconciliation) to **all the people** of the world.

## UPCSA DEFINITION OF A CONGREGATION

A Congregation (or worshipping community) is a group of people who gather regularly to meet Christ in Word and Sacrament, practice mutual care and make disciples in our changing contexts. They do so while seeking to participate with God in the transformation of the world. As communities, they move toward sustainability in leadership and ministry.

# Comparison: Missional Church and Congregation

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## Congregation

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# SUCCESS

“SUCCESS IS THE SUM OF SMALL EFFORTS,  
REPEATED DAY IN AND DAY OUT”

Robert Collier

The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. These shapes are primarily located on the right side of the frame, creating a modern, layered effect. The rest of the background is plain white.

# **THE ROLE OF THE VISION, MISSION, GOALS, PRIORITIES, AND VALUES**

# VISION

- ▶ Dictionary: **“The formation of a mental image of something that is not perceived as real and is not present to the senses.”**
- ▶ “An aspirational description of what an organisation would like to achieve or accomplish in the mid-term or long-term future. It is intended to serve as a clear guide for choosing current and future courses of action.”
- ▶ A vision statement is a focus, the road map of any institution, organisation or company. It serves to
  - ▶ Determine what the institution, organisation or company wants to become; and
  - ▶ Guide all the transformational initiatives towards growth.
- ▶ Vision statements are beneficial for the institutions/organisations/companies, as they serve the following:
  - ▶ “Serve as foundations for a broader strategic plan
  - ▶ Motivate existing employees and attract potential employees
  - ▶ Focus company efforts and facilitate the creation of core competencies
  - ▶ Help companies differentiate from competitors”

# VISION (Cont)

- ▶ A vision statement may demonstrate the following traits:
  - ▶ “concise: able to be easily remembered and repeated
  - ▶ clear: defines a prime goal
  - ▶ future-oriented: describes where the company is going rather than the current state
  - ▶ stable: offers a long-term perspective and is unlikely to be impacted by market or technology changes
  - ▶ challenging: not something that can be easily met and discarded
  - ▶ abstract: general enough to encompass all of the organization's interests and strategic direction
  - ▶ inspiring: motivates employees and is something that employees view as desirable”

# MISSION

- ▶ “A written declaration of an organisation’s core purpose and focus that normally remains unchanged over time. Properly crafted mission statements (1) serve as filters to separate what is important from what is not, (2) clearly state which markets will be served and how, and (3) communicate a sense of intended direction to the entire organization.”
- ▶ A **mission statement** states the purpose of a company, organisation, institution or person. It communicates the reason for its existence. It is a written declaration of an organization's core purpose and focus that normally remains unchanged over time.
- ▶ “The mission statement should guide the actions of the organization, spell out its overall goal, provide a path, and guide decision-making. It provides "the framework or context within which the company's strategies are formulated." It is like a goal for what the company wants to do for the world.”

# VISION AND MISSION COMPARED

Serial No	Factor	Mission	Vision
	a	b	c
1	About	A Mission statement talks about HOW you will get to where you want to be. Defines the purpose and primary objectives related to your customer needs and team values.	A Vision statement outlines WHERE you want to be. Communicates both the purpose and values of your business.
2	Answer	It answers the question, "What do we do? What makes us different?"	It answers the question, "Where do we aim to be?"
3	Time	A mission statement talks about the present leading to its future.	A vision statement talks about your future.

# VISION AND MISSION COMPARED (Cont)

Serial No	Factor	Mission	Vision
	a	b	c
4	Function	It lists the broad goals for which the organization is formed. Its prime function is internal; to define the key measure or measures of the organization's success and its prime audience is the leadership, team and stockholders.	It lists where you see yourself some years from now. It inspires you to give your best. It shapes your understanding of why you are working here.
5	Change	Your mission statement may change, but it should still tie	As your organization evolves, you might feel tempted to change your vision. However, mission or vision statements

# VISION AND MISSION COMPARED (Cont)

Serial No	Factor	Mission	Vision
	a	b	c
6	Developing a statement	What do we do today? For whom do we do it? What is the benefit? In other words, Why we do what we do? What, For Whom and Why?	Where do we want to be going forward? When do we want to reach that stage? How do we want to do it?
7	Features of an effective statement	Purpose and values of the organization: Who are the organization's primary "clients" (stakeholders)? What are the responsibilities of the	Clarity and lack of ambiguity: Describing a bright future (hope); Memorable and engaging expression; realistic aspirations, achievable;

# GOALS

- ▶ “An observable and measurable end-result having one or more objectives to be achieved within a more or less fixed timeframe.”
- ▶ “Goals tend to change your mindset by changing your focus. And as your focus changes, it takes your thinking with it. This is why goals are often accompanied by *affirmations*, which involve projecting yourself into the desired (but as yet unattained) destination.”
- ▶ “A goal is a desired result a person or a system envisions, plans and commits to achieve a personal or organisational desired endpoint. Many people endeavour to reach goals within a finite time by setting deadlines. It is roughly similar to purpose or aim, the anticipated result which guides reaction, or an end, which is an object, either a physical object or an abstract object that has intrinsic value.”

## **PRIORITIES (Mission Critical Success Factors)**

- ▶ "Critical success factors are those few things that must go well to ensure success for a manager or an organization, and, therefore, they represent those managerial or enterprise area, that must be given special and continual attention to bring about high performance. CSFs include issues vital to an organization's current operating activities and to its future success."
- ▶ "The limited number of areas in which results, if they are satisfactory, will ensure successful competitive performance for the organization. They are the few key areas where things must go right for the business to flourish. If results in these areas are not adequate, the organization's efforts for the period will be less than desired. CSFs are areas of activity that should receive constant and careful attention from management."

# VALUES

Values are beliefs which your organization's members hold in common and endeavour to put into practice. The values guide your organization's members in performing their work. Specifically, you should ask, "What are the basic beliefs that we share as an organization?"

# STRATEGY

- ▶ Has to do with **ENDS, WAYS** and **MEANS**.
- ▶ Strategy includes processes of formulation and implementation; strategic planning helps coordinate both. However, strategic planning is analytical in nature (i.e., it involves "finding the dots"); strategy formation itself involves synthesis (i.e., "connecting the dots") via strategic thinking. As such, strategic planning occurs around the strategy formation activity.
- ▶ Clausewitz: "The use of engagements for the object of war."
- ▶ Alfred Chandler: "Strategy is the determination of the basic long-term goals of an enterprise, and the adoption of courses of action and the allocation of resources necessary for carrying out these goals."

# STRATEGY (Cont)

- ▶ **Strategic planning** is an organisation's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy.
- ▶ Michael Porter argued that formulation of competitive strategy includes consideration of four key elements:
  - ▶ Company strengths and weaknesses;
  - ▶ Personal values of the key implementers (i.e. management and the board);
  - ▶ Industry opportunities and threats; and
  - ▶ Broader societal expectations.

# STRATEGY (Cont)

- ▶ The organization's leaders may have a series of questions they want answered in formulating the strategy and gathering inputs, such as:
  - ▶ What is the organization's business or interest?
  - ▶ What is considered "value" to the customer or constituency?
  - ▶ Which products and services should be included or excluded from the portfolio of offerings?
  - ▶ What is the geographic scope of the organization?
  - ▶ What differentiates the organization from its competitors in the eyes of customers and other stakeholders?
  - ▶ Which skills and resources should be developed within the organization?
  - ▶ Strategic planning involves clearly defining the organization's mission and an assessment of its current state and competitive landscape.
  - ▶ Depending on the scope of an organization's plans, a strategic planning process can look forward one, five or 10 years, or even more in some cases.

# STRATEGIC PLANNING PROCESS

- ▶ Determine where you want to be.
- ▶ Environmental analysis/scan using different methods including SWOT, STEEPLES (PESTELS)
- ▶ Establish your higher order goals
- ▶ Set the objectives(smart)
- ▶ Develop the activity plans (Who, what, where, when, why, with what)
- ▶ Implementation plan
- ▶ Monitoring and evaluation

# CHANGE MANAGEMENT

- ▶ **Change management** is an approach to transition individuals, teams, and organisations to a desired future state. Regardless of the many types of organizational change, the critical aspect is a company's ability to win the buy-in of their organization's employees on the change. Effectively managing organizational change is a four-step process:
  - ▶ Recognizing the changes in the broader business environment
  - ▶ Developing the necessary adjustments for their company's needs
  - ▶ Training their employees on the appropriate changes
  - ▶ Winning the support of the employees with the persuasiveness of the appropriate adjustments

# CHANGE MANAGEMENT PROCESS

## Prosci 3-Phase Change Management Process

- ▶ **Phase 1 - Preparing for change** (Preparation, assessment and strategy development)
  - ▶ Define your change management strategy
  - ▶ Prepare your change management team
  - ▶ Develop your sponsorship model
- ▶ **Phase 2 - Managing change** (Detailed planning and change management implementation)
  - ▶ Develop change management plans
  - ▶ Take action and implement plans
- ▶ **Phase 3 - Reinforcing change** (Data gathering, corrective action and recognition)
  - ▶ Collect and analyse feedback
  - ▶ Diagnose gaps and manage resistance
  - ▶ Implement corrective action and celebrate success

# CHANGE MANAGEMENT PRINCIPLES

- ▶ At all times involve and agree support from people within system (system = environment, processes, culture, relationships, behaviours, etc., whether personal or organisational).
- ▶ Understand where you/the organisation is at the moment.
- ▶ Understand where you want to be, when, why, and what the measures will be for having got there.
- ▶ Plan development towards above No.3 in appropriate achievable measurable stages.
- ▶ Communicate, involve, enable and facilitate involvement from people, as early and openly and as fully as is possible.

# CHANGE MANAGEMENT APPROACH

## John P Kotter's eight steps to successful change:

- ▶ **Increase urgency** - inspire people to move, make objectives real and relevant.
- ▶ **Build the guiding team** - get the right people in place with the right emotional commitment, and the right mix of skills and levels.
- ▶ **Get the vision right** - get the team to establish a simple vision and strategy, focus on emotional and creative aspects necessary to drive service and efficiency.
- ▶ **Communicate for buy-in** - Involve as many people as possible, communicate the essentials, simply, and to appeal and respond to people's needs. De-clutter communications - make technology work for you rather than against.

# CHANGE MANAGEMENT APPROACH (Cont)

## John P Kotter's eight steps to successful change:

- ▶ **Empower action** - Remove obstacles, enable constructive feedback and lots of support from leaders - reward and recognise progress and achievements.
- ▶ **Create short-term wins** - Set aims that are easy to achieve - in bite-size chunks. Manageable numbers of initiatives. Finish current stages before starting new ones.
- ▶ **Don't let up** - Foster and encourage determination and persistence - ongoing change - encourage ongoing progress reporting - highlight achieved and future milestones.
- ▶ **Make change stick** - Reinforce the value of successful change via recruitment, promotion, and new change leaders. Weave change into culture.

# CONCLUSION

- ▶ The old adage remains true: If you fail to plan, you plan to fail.
- ▶ Someone said: If you don't have a sense of destination, any road leads you to some destination (if you don't know where you are going to, you never get lost.)
- ▶ One thing that is constant: CHANGE. If you don't want to change, change will change you.