

**An Evaluation of a
Process of Strategic Planning
in the
Missionary Society of St. Columban**

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Declaration:

"I hereby certify that this material, which I now submit for assessment on the programme of study leading to the award of Masters in Business Studies, is entirely my own work and has not been taken from the work of others, save and to the extent that such work has been cited and acknowledged within the text of my work."

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ABSTRACT

This study is an evaluation of a process of strategic planning in the Missionary Society of St. Columban. Four Regions of the Society, Korea, Fiji, Chile and Britain were taken as a representative sample. The documentation from their planning processes was analysed and 108 members were surveyed by questionnaire. The study found that strategic planning could be profitably used by an international missionary organization and that it could help the Society improve: its sense of direction and unity; communication; participation; and morale. It also proved a valuable instrument for renewal, long-term change and leadership training. The study identifies a number of conditions for successful planning processes in missionary congregations and concludes that different planning approaches are valuable at different times in the life cycle of the organization. In the earlier stages the more rational and formal approach to planning seemed the best approach for the Columbans. Once the members had begun to think systematically about the future, it was clear more attention needed to be given to process, leadership, vision, managing cultural change, building learning communities and increasing the organization's capability to become more responsive and relevant.

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CHAPTER 1 THE PROBLEM AND THE PURPOSE OF THIS STUDY

Introduction

Today organizations throughout the world are faced with difficult corporate choices about redefining their mission, restructuring and retraining in order to remain relevant and survive into the 21st Century. Religious organizations are no exception. Many are in a state of crisis as they try to cope with questions about their relevance, the need to rethink their major apostolates, a dramatic decline in the number of entrants and ageing membership. Missionary organizations, such as the Missionary Society of St. Columban, share most of these problems. Since the end of the Colonial period and the growth of local churches there has been a radical questioning of their role, value and contribution. Spread throughout the Third World they have also lived through coups, revolutions, famines and profound and widespread poverty. These events have challenged their self-understanding in a profound way. As international organizations based in many diverse countries they have experienced these crises to differing degrees and at different times resulting in distinct and sometimes divergent understandings of their vocation among their own members.

The Missionary Society of St. Columban¹ faced with these problems decided at its General Assembly in Pusan, Korea in 1988 to undertake a radical assessment of all its works so as to plan more systematically for the future. The hope was that a secular process, such as strategic planning, could be transferred from the world of business to an international missionary organization and would help the Society clarify its identity, identify the real missionary needs and plan realistically for the future.

This chapter will have five sections. The first is a statement of the problem. The other four are explanations of: i) the purpose of this study; ii) its significance; iii) the assumptions and limitations of the study; and iv) definitions of important terms.

1 In this thesis the Missionary Society of St. Columban is also referred to as "the Society" and "the Columbans".

I. Statement of the Problem

a) The missionary crisis and the search for a new identity.

According to David Bosch [1991] mission today is in a state of profound crisis concerning the foundation, motivation and nature of mission. Others who talk of this crisis are, Gómez [1986] and Amaladoss [1987, 1988, 1989]. Pope John Paul II, while he would probably not agree with the details of their analysis, recognised the crisis when he wrote his encyclical letter, *Redemptoris Missio* or *Encyclical Letter on the Permanent Validity of the Church's Missionary Mandate*. The encyclical was written to assert the lasting validity of the Church's mission and to give special encouragement to missionaries and missionary societies. "The special vocation of missionaries 'for life' retains all its validity Therefore the men and women missionaries who have devoted their whole lives to bearing witness to the risen Lord among the nations must not allow themselves to be daunted by doubts, misunderstanding, rejection or persecution." [John Paul II, 1991 #66].

Missionaries are normally generous people full of good will and conviction. They are sufficiently convinced of the value of the Christian message and concerned about the plight of their brothers and sisters in the Third World to leave their homes and live most of their lives in a foreign country. Traditionally they suffered many physical hardships but they were needed, respected, convinced of the need to "save souls" and buoyed up by the obvious benefits they were bringing to the underprivileged. They had few questions about the validity of what they were doing. However, as Bosch [1991] pointed out, earlier mission was often built on shaky foundations. The success of Christian mission frequently became the foundation of mission. Confidence about mission has now been replaced by a profound malaise and a loss of nerve. These days the hardships of the modern missionary relate more to questions of meaning than physical deprivations. Missionaries are no longer in charge, not as needed or respected and they personally have many questions about the value of what they are doing.

Some of the reasons for this malaise in missionary life today are i) the growing realisation of the validity of other religions; ii) the general crisis of meaning in the West; iii) the end of the Colonial period and the growth of independent local churches; iv) a theological shift in the understanding of mission and salvation; v) increased expectations in the areas of culture, religion and language; vi) social

turmoil in many of the countries missionaries work in; vii] the challenge posed by the growth of feminism and lay mission; and vii] the gap between the new expectations of missionaries and their actual training.

i] The validity of other religions. For centuries Christian missionaries have given their lives to "save souls". The conviction that the Church was the only way to salvation made up for all the hardships. So it was profoundly disturbing for missionaries when, through their own experience and through the pronouncements of the Second Vatican Council, they grew to appreciate the validity of other religions. Vatican II in *Lumen Gentium* #16, *Nostra Aetate* . #2-5, *Ad Gentes* #9 and *Gaudium et Spes* . #22 affirmed that much of the other religions of the world was holy and true and that they could be a way to salvation. [Abbott, 1966]. The growing realisation of the validity of other religions has disturbed many missionaries' unwarranted certainties and robbed them of much of their motivation. Why "suffer the pangs of exile and the stings of mosquitoes" if people will be saved anyway? It is bad enough to have a difficult job to do but much worse when one is left wondering if the difficult job is worth doing at all. [Bosch, 1991]

The Church and many missiologists, e.g. Amaladoss [1988], Gómez [1986], Shorter [1988] and Bosch [1991], insist on the necessity of a dialogue as an essential part of mission, but the change from "conquest" to dialogue has left many missionaries feeling lost. They were more accustomed to proclaiming a "precious message" than to listening to the divine-human dialogue that has been going on in the midst of their new people for centuries. [Knight, 1986; Mantovani, 1986; Amaladoss, 1988]. *Ad Gentes* #34 instructed that missionaries "must be "scientifically prepared for their task, especially for dialogue with non-Christian religions and cultures". [Abbott, 1966]. But to this day most missionaries have not been adequately trained for dialogue.

ii] The general crisis of meaning in the West. Western civilisation not only doubts mission but doubts itself and missionaries share much of that doubt. In the West scholars in almost all disciplines [including theology] are preoccupied with metaquestions. This in itself is indicative of a crisis or paradigm shift. Particular manifestations of this crisis in the missionary world are a] the growing appreciation of the validity of other religions, b] the advance of science which seems to have made God irrelevant; c] the guilt we feel before the poor of the Third World; and d] the vigour of these young Churches who refuse to be dictated to and whose theology is

more vibrant. All of this has led to profound uncertainties in the Western Churches and many Western missionaries have lost the courage to "convert" the world, some may even doubt whether they have much to offer at all. [Gómez, 1986; Bosch, 1991].

iii] The end of the Colonial period and the growth of independent local churches.

The age of mission to Africa, Asia and Latin America coincided with the age of Colonialism and while the interests of the missionaries and the colonial powers did not always coincide, missionaries often profited from the structures set up by the colonists and were identified in the minds of many indigenous people with the colonial powers. With independence there has been a growth in nationalism and a resurgence of indigenous religions and cultures. This has marginalised the missionaries and their churches as foreign elements. [Amaladoss, 1989; Hiebert, 1987; Bosch, 1991]. Nowadays in Asia the only countries from which missionary visas are easily obtainable are Japan, Korea and the Philippines. One can obtain missionary visas for Taiwan and Thailand with some reservations. In some countries nationalism has resulted in resentment of former missionaries. Almost everywhere missionaries are less appreciated and have had to take secondary places in local churches. Missionaries are no longer central to the life and future of the young churches. Most major decisions are made without their input and they often find ourselves seriously out of tune with the new priorities of local churches that are often disappointingly nationalistic, bureaucratic and conservative. [Gómez, 1986; Bosch, 1991].

There has been a similar shift in the theology of mission. Vatican II places the responsibility for mission on the bishop and local church. *Ad Gentes* #38. [Abbott, 1966]. Local hierarchies are in charge almost everywhere and some of the most vigorous Regional Bishops Conferences can be found in Asia [Federated Asian Bishops Conference, FABC] and Latin America [CELAM]. Many missiologists now talk about the need for the missionary to be invited by the local church. Today this may seem the only right and natural thing to do but it is a "Copernican revolution" for missionaries who originally set up these local churches and possibly educated most of the new local leaders. To highlight this change in role, power and responsibility some of the more common images for a missionary these days are "guest" or "stranger". [Joinet, 1972, 1974; Gittins, 1989].

As local bishops and priests take over the running of traditional "missionary" churches there are increased expectations of foreign missionaries. A higher degree of linguistic competence, greater cultural sensitivity, historical, political and social understanding are regarded as essential.

The local Churches, especially in Asia, have come of age and are fast approaching self sufficiency with regard to staffing the traditional parishes and works. Since that is what most missionaries have been trained to do and have always done, they now feel very insecure about their future. The missionaries who seem most acceptable are fellow "Third Worlders". Nowadays the emphasis is on a "South" <----> "South" exchange of missionaries or on missionaries going from "South" ----> "North".

v) The theological shift in the understanding of mission and of salvation. There have also been a dramatic shift in the theology of mission since Vatican II. [Richey Hogg [1985], Gómez [1986] and Bosch [1991] give a good overview of these developments. Perhaps the most profound theological development has been the great increase in appreciation of the role of the human in peoples' religious lives. [Frazier, 1985]. Vatican II, especially in *The Church in the Modern World*, looked much more positively on the world, embraced all history and saw within it the purpose of God. Abbott [1966] There is now a stronger emphasis on the necessity of liberation for true evangelization and on a holistic view of mission that includes creation as well as revelation. These views found expression and support in the two major themes of Paul VI's papacy, "justice" and "evangelization". In his definitive *On Evangelization in the Modern World* he provided an excellent and convincing theology linking but not reducing evangelization to liberation and the struggle for a just society. [Paul VI, 1975]. This new combination of human and spiritual, heaven and earth, body and soul, evangelization and liberation is what is meant by the biblical image of the "Kingdom of God". The Kingdom or Reign of God is seen as being much wider than the Church. The Church is only a sign and servant of the Kingdom, rather than the sole possessor of eternal life. The focus in mission theology is now on the Kingdom or Reign of God rather than on the Church. The official church is still ambivalent about this new understanding. "Kingdom of God" and "Liberation" are confusing concepts for many missionaries, most of whom are Church-centred people who received their theological education before Vatican II and before images such as the Kingdom of God became theological mainstays.

vi] Increased expectations of missionaries in the areas of culture, religion and language. Another new aspect of evangelization highlighted by Paul VI's *On Evangelization in the Modern World*, and now a major emphasis in modern mission is inculturation or the evangelization of cultures. Paul VI stressed that "every effort must be made to ensure a full evangelization of culture, or more correctly of cultures". [Paul VI, 1975 #20]. These days missionaries are expected not just to proclaim the doctrines of the Catholic Church, albeit in the language and symbols of their new peoples, but to inculturate or incarnate the Gospel in this culture. [Amaladoss, 1989 b; Shorter, 1988; Roest Crolius, 1986]. Such an approach to mission is much more demanding on the missionary who must now have a profound understanding of his own Christian religious experience and culture as well as a deep understanding of the culture of his new people and a facility with their language and symbols.

vi] Social turmoil. Many of the countries where missionaries work are in a state of social turmoil and they cannot help but be caught up in this. Much of this has been well documented elsewhere, but the economic and political conditions in many Third World countries are worse now than they were 10 years ago. This has added to the pressure and demands on missionaries.

vii] The growth of lay mission and feminism. The growth of lay mission and of feminism are major challenges to largely clerical missionary congregations and to the various local churches many of whom do not fully understand or appreciate the contribution lay missionaries and women can make to international mission.

viii] Lack of training for these new expectations. Even from this brief and far from complete review of major changes and challenges in the missionary world it is little wonder that mission is in a state of crisis and missionaries are searching for a new identity. Besides their traditional duties as pastors they now have become aware of responsibilities to work for justice, to incarnate the Gospel in cultures not their own and to dialogue with peoples of other faiths. These are frightening expectations on many who had no training for these new missionary tasks and only wanted to be priests overseas. In these circumstances many missionaries, including Columbans, feel overwhelmed. Too many demands are being made on them. The reality is that no one, no matter how talented or well trained, could take on all these new

challenges of mission. What seems to be needed are strategic choices, planning, renewal and retraining.

In addition to these challenges, missionary societies share the life cycle problems of any organization. Historians of religious congregations such as Cada talk of five phases in a religious institution's life cycle. 1) Foundation. This is a time of grace, charism, enthusiasm, extraordinarily gifted and convinced members. 2) Expansion. A time when the original charism and inspiration are institutionalised and codified. The founder may still be alive. The membership is still above-average in commitment and skills. 3) Stabilisation. A feeling of great success pervades the group. The works prosper. Activism begins to dominate. Members tend to be carried along by the success/prestige of the community's activities, rather than by deep personal commitment or vocation. People join at this phase who would never join at any other phase. 4) Breakdown. A period of disruption and disillusionment... Institutional structures and belief systems disintegrate, giving way to widespread doubt and stress. This phase is precipitated often by a minority's dissatisfaction with the internal life of the group or the relevance of its works. 5) Transition to total extinction, minimal survival or revitalisation. [Cada et al., 1979].

Many missionary groups, including the Columbans, seem to be in the Breakdown Phase. An additional problem in the Breakdown Phase is that there are likely to be a large number of people who joined in Phase 3 who would not have joined during any other Phase. These people may not have the commitment and imagination to make the changes demanded in Phase 4.

b] The Missionary Society of St. Columban

The Missionary Society of St. Columban is an exclusively missionary society within the Catholic Church. It was founded in 1916 by two Irish priests, Edward Galvin and John Blowick, for the conversion of China. Both were secular priests and many of the Society's first members were staff or students of St. Patrick's College, Maynooth. The Society is not a religious order and would prefer to see itself as "the missionary arm of the secular clergy". It spread to the United States in 1918 and to Australia in 1919. The majority of members come from these three countries, plus Britain and New Zealand. In the past ten years members have also been accepted from the Philippines, Korea, Fiji, Vietnam, Chile and Peru.

At first the vision did not extend beyond China, but gradually the Society expanded to the Philippines [1929], Korea [1933], Burma [1936], and Japan [1948]. When mainland China was closed to missionaries in the 1950's, the Society responded to the urgent call of Latin America and Columbans went to the poor in the new urban settlements in Lima, Peru and Santiago de Chile [1951]. The Society also started a new mission in Fiji [1951]. They went to Pakistan and Taiwan [1978]. New missions were opened in Brazil [1985], and Jamaica and Belize [1986]. Finally in 1989 the Society established a Mission Unit in its original mission, China. At present it has 704 priest members, 1 brother and 89 students working in 18 different countries.

The purpose of the Society. The Constitutions of the Society define its nature and purpose as:

C.101. The Missionary Society of Saint Columban is an exclusively missionary Society sent by the Church "to the Nations", to proclaim and witness to the Good News in Jesus Christ of the full Christian liberation and reconciliation of all peoples.

C.102. Crossing boundaries of country, language and culture, the Society has as its specific objectives:

- to establish the Church among peoples to whom the Gospel has not been preached;*
- to help Churches mature until they are able to evangelize their own and other peoples;*
- to promote dialogue between Christians and those of other religious traditions;*
- to facilitate interchange between local Churches, especially those from which we come and those to which we are sent;*
- to foster in local Churches an awareness of their missionary responsibility.*

The structure of the Society. The Society has a highly centralised structure. The Chief Executive Officer of the Society is the Superior General and he is assisted by a Vicar General and 3 Councillors. Together they make up the General Council whose powers are considerable. In effect the General Council: a) appoints members to the various Regions or Mission Units through out the world; b) appoints all major

officers of the Society, e.g. Directors of Regions and Coordinators in Mission Units, Regional/Mission Unit Bursars and all members of formation staffs; c] approves budget applications for all the Regions and Mission Units throughout the world; d] accepts new missions and closes old ones; and e] is ultimately responsible for the animation and visitation of all Regions and Mission Units.

The Society is divided into Regions & Mission Units. There are 10 Regions in the Society: Australia & New Zealand, Britain, Chile, Fiji, Ireland, Japan, Korea, Peru, the Philippines, and the United States. These Regions are administered by Regional Directors and their Councils. Their powers and responsibilities relate to the internal running of their Region. They are expected to provide it with leadership and direction. They make all internal appointments, negotiate with the General Council about getting new staff from other Regions, decide on budget submissions to be sent to the General Council. There are also 6 Mission Units in the Society: Belize, Brazil, China, Jamaica, Pakistan and Taiwan.

The culture of the Society. Although the Society is highly centralised especially in the allocation of resources, personal and material, in most of its day to day operations it is highly decentralised. Its structure coincides most closely with a Professional Bureaucracy. [Mintzberg, 1983]. The Columbans are a service-oriented organization, made up of highly trained professionals who would normally expect to be allowed to meet the needs of their people in relative freedom. The situations they face are highly varied and it would be impossible and counter-productive to try to organize them from Central Administration. Members are protective of their freedom and resist being 'organized'. There is a democratic culture which limits what administrators can do. There is a strong demand for consultation and participation in decision making processes.

The primary co-ordinating mechanism for the Columbans is the standardisation of skills. Members receive 7-9 years training in missionary priesthood before taking up their overseas appointment. Up till recently that was seen as sufficient for life and it did enable members to work effectively in a great variety of countries with little guidance, supervision or administration. It was a satisfactory co-ordinating mechanism until the beginning of the crisis in missionary identity. As Mintzberg [1983] points out professional bureaucracies cope well with complex but stable environments. The situation missionaries face today is complex and it is no longer

stable. Missionaries are finding their professional training, which placed greater emphasis on priestly rather than missionary formation, no longer adequate.

c] The Columban history leading up to its decision to plan.

Columbans are faced with the same crisis about missionary identity as many other missionary organizations. In fact they may be more exposed than many others because of working in so many different environments. Involvement in each country has expanded the members' interpretation of the Society's role and objectives. Bernard Cleary, Superior General 1982-1988, outlines the history of this expansion. The Society was originally founded for China and the emphasis was on proclaiming the Gospel to those who had not heard it [primary evangelization]. Of the other early "mission" countries, Korea and Burma were similar missions. The Philippines, a largely Christian country but in need of priests, was considered "a Region outside the missions". However, since World War II the major expansion in the Society's mission has been in the Philippines, Fiji and Latin America. Cleary outlines how this shift in the balance of personnel resulted in a similar shift in the Constitutional understanding of the Society's purpose. Up till 1970 the emphasis was on conversion or "primary evangelization", but from then on there has been growing tendency to accommodate the various other Columban experiences. Cleary's challenge to the 1988 General Assembly was, "I think it is time for the Society to review and endeavour to clarify its position. Do we wish to go further down this path of less clearly defined mission, call a halt at the present stage or re-affirm a commitment to primary evangelization?" [Cleary, 1988 p. 6].

The General Assembly evaded this question and opted for an historical, inclusive answer to what it means to be Columban. However, it did adopt another of the Superior General's related challenges, namely, the challenge to all Columbans to assess the missionary needs of their local church and the quality of the Society's present apostolates so as to plan more effectively for the future. *Becoming More Missionary* #148-150. There were a number of reasons for deciding to assess and plan. i] It was seen as part of the Society's search to become more missionary, to discover a new missionary identity. ii] There was a feeling that the Society was drifting or coasting and that it was time to assess its apostolates to see if the Society was meeting the most pressing missionary needs. iii] Some delegates wanted to open a new mission and felt that an assessment would reveal if we had the men to

spare. iv] Finally it was a response to a decline in membership and a desire to use their personnel as effectively as possible.

The decline in the number of members had just begun to bite and has become more serious since 1988.

Totals from the Society Personnel Directory

Year	Priests	Brothers	Students
1985	797	2	86
1986	791	2	99
1987	769	1	102
1988	756	1	112
1989	735	1	122
1990	730	1	91
1991	713	1	87
1992	704	1	89

Figure 1.1

In 1981 the Society had commissioned the Center for Applied Research in the Apostolate [CARA] to produce a report entitled, *Manpower For the Eighties and Nineties: Personnel Projections to 1999*. [Sullivan & Kuruvilla, 1981]. They produced both pessimistic and optimistic projections for the Society.

CARA's Pessimistic & Optimistic Projections for the Society

Actual Count 1992	1989		1994		1999	
	Pess.	Optim.	Pess.	Optim.	Pess.	Optim.
704	721	759	624	680	524	599

Figure 1.2

The problem is more serious if you look at the age distribution of members Society wide.

Age Distribution ²

Under 35	35 - 44	45 - 54	55 - 64	65 - 74	75+
19	57	160	211	174	96

Figure 1.3

The Society's future prospects are not strong either. Although there are 89 students at present the Society has not attracted many new candidates over the past five years.

The "Refounding" Groups. Shortly after the 1988 General Assembly a number of "Refounding" groups formed throughout the Society. The two major ones were in Ireland and Korea. It is difficult to say how many Columbans joined these groups as they were loosely structured and the membership changed constantly, however more than fifty people attended at least one meeting. There would be more who sympathised with their objectives. The groups were inspired by Arbuckle's book, *Out of Chaos: Refounding Religious Congregations*. Arbuckle believes that most religious organizations are at present in a state of chaos. This chaos is inevitable and even essential to break down rigid barriers. It is the opportunity for creativity. The way out of chaos is for the congregation to recognise the chaos and want to refund. This is most effectively done by individual pathfinders, "intrapreneurs" or "refounders". The problem today is that the implementers or problem-solvers are dominant and the pathfinders have been marginalised. It is the responsibility of leadership to foster creativity and these pathfinders or refounding persons. [Arbuckle, 1988]. The major demands from the Refounding groups were for a) a formal study of refounding and its relevance for the Society; b) more "hands-on" leaders who were committed to the Society's policies; c) better processes for the selection of leadership; and d) better leadership and support structures to enable involved and committed members to participate in decision-making.

² The figures quoted are for permanent members and include some students. It is difficult to find up to date figures but these were calculated early in 1993 and give a reasonable idea of the age structure of the Society.

II. The Purpose of this Study.

The purpose of this study is to examine whether strategic planning can be transferred to an international missionary congregation and to evaluate how well the process has helped the Society.³ Did it help renew the Society and prepare it for the future. A particularly focus is in evaluating whether the process was effective in the ways frequently mentioned by the advocates of strategic planning, namely was it effective in:

- a) helping the Society gain a clearer and more unified sense of direction;
- b) enabling the members to identify the missionary needs in their environment;
- c) helping the Regions to be more realistic about their personnel resources;
- d) enabling the various Regions to make the appropriate changes, expansion in some areas and cutbacks in others;
- e) improving communication within the Regions;
- f) improving morale, a sense of satisfaction and participation;
- g) lengthening the time horizons of leaders and helping leaders and members to think more systematically about the future;
- h) improving the Directors' and the General Council's leadership skills;
- i) enabling the Society to become a more flexible, adaptable and self-correcting organization;
- j) providing the Regions with plans/criteria against which to measure future decisions.

It is also hoped to identify the special difficulties the Society encountered in transferring the process of strategic planning from the commercial to the missionary world and what adaptations needed to be made to help other international missionary organizations in their planning processes.

III. The Significance of this Study

The problems facing the Missionary Society of St. Columban are real and they are shared by many other religious and especially missionary organizations. It is hoped

³ The period covered by this study is from June 1989 - May 1992 when the individual questionnaires were returned to the author. Although the process has continued since then it seemed the logical terminus for the study as it would be difficult to correlate later developments with the results of questionnaire.

that this study will help improve the Society's present planning process. Success in this process is important for the life, morale, efficiency and future of the Society and its 704 members. It will also have a considerable effect on the thousands of people with whom Columbans work.

So far there is very little written about strategic planning in religious congregations and nothing on strategic planning in international missionary organizations.⁴ It is hoped that this thesis will establish that religious and missionary congregations have something to learn from the world of business and that it will prove a small contribution to the literature on strategic planning by extending it to this new field.

Finally, since there are a number of other international missionary organizations facing similar problems to those of the Missionary Society of St. Columban this research may help them to learn from the Columban experience and design a better processes for themselves.

IV. Assumptions and Limitations

Before continuing with this study, it is necessary to make two comments. Firstly, it is important for the reader to know that the author of this study is the Vicar General of the Missionary Society of St. Columban, i.e., the second-in-charge of the Society throughout the world and a member of the General Council. As such he has been one of two people officially responsible for the whole process of strategic planning. He has been intimately involved in all stages of the planning process at the central level, designing the process, reviewing all the Regional Plans of Action and organizing training in leadership and planning.

Secondly, it is important to remember that the methodology of this study is akin to Action Science. [Argyris, 1983; Peters & Robinson, 1984; Gummesson, 1991]. It was more than a controlled experiment. It involved a genuine attempt at strategic planning and demanded quite a deal of learning, relearning, adapting and reformulating as the process of strategic planning went on. The methodology of this study can best be described as participative and flexible. It involved a process of on-going learning

⁴ A search of ABI/INFORM produced only two articles under the subjects 'strategic planning' and 'religious organizations' and none under 'strategic planning', 'international' 'religious organizations'.

and correction. From the beginning each stage has been adapted or reformulated in the light of the results of the previous stage.

V. Definitions of Important Terms

It does not seem necessary to further define the two major terms in this study, namely the Missionary Society of St. Columban and strategic planning. The Society, its purpose, membership, structure, history and current problem have already been described at length. The literature on strategic planning will be reviewed in Chapter 2 and the Columban process of strategic planning fully described in Chapter 3.

CHAPTER 2 A REVIEW OF THE LITERATURE ON STRATEGIC PLANNING

Introduction

The concept of strategy made its first real impact in schools of management in the early 1960s. But like many concepts in the field of management it has proven difficult to find an agreed, comprehensive definition. Mintzberg in his article, *Opening Up the Definition of Strategy*, gives five possible definitions: plan, ploy, pattern, position and perspective. [Mintzberg, 1988]. Although a number of these definitions are compatible, for example, strategy as perspective is compatible with either strategy as plan or pattern, it is not possible to reconcile all these definitions of strategy. Perhaps the one thing that can be said to be essential to the definition of strategy is that it is fundamentally a qualitative mode of thinking. It is concerned with the future direction and development of the organization rather than its operational activities.

The first section of this Chapter will review the literature and developments in strategic planning in the hope of developing the theoretical basis from which to evaluate the Columban planning processes. The second section will give some more detailed comment on two crucial planning questions: the need to change the culture of an organization and the vital role of leadership. The third section will report on a search for similar research projects. In the fourth, there will be some discussion of the special difficulties of strategic planning in a international, not-for-profit religious organization. The final section is devoted to presenting the model used by the Society in the early stages of its planning process. Comments and conclusions as to which school or theory proved the most helpful in designing or understanding the Columban process of strategic planning will be given in Chapter 5.

I. The Various Schools of Strategic Planning

The first major works on strategic planning were Chandler [1962] *Strategy and Structure*, Ansoff [1965] *Corporate Strategy*, and Learned, Chistensen, Andrews & Guth [1965] *Business Policy: Text & Cases*. All of these had a rational approach to planning. It was a time of growth, expansion and diversification. The principal interest of the early writers, Ansoff and Andrews, was to plan the best possible fit between the opportunities and threats in the environment and the strengths and

weakness of the company. It was hoped that a company could through analysis and planning avoid the threats, grasp its opportunities and maximise the achievement of its objectives. Planning was seen as an intentional and prescriptive process based on a rational model of decision making.

However, as the 1970s and 1980s progressed the world entered into first stagflation and then global competitiveness. The situation became so much more dynamic and unpredictable. People came increasingly to view institutions as social systems so strategic planning started to turn away from mathematical models and rational approaches to stressing human creativity, flexibility and entrepreneurship. New strategists found the economic, rational, intentional and prescriptive approach of the early strategic planners too formal and unreal and preferred a more emergent, incremental, crafting and learning approach to strategic planning and change. Schools of planning began to multiply to the extent that when in 1990 Mintzberg produced his comprehensive review of the literature, *Strategy Formation: Schools of Thought*, he identified ten different schools of strategic management. The first three the design school [Andrews], the planning school [Ansoff] and the positioning school [Porter] belong to the rational prescriptive approach. Six others, the entrepreneurial, cognitive, learning, political, cultural and environmental schools belong to the more descriptive, emergent, learning approach to planning. The final configurational school, Mintzberg's own school, combines all the other approaches into a single perspective to be used in different ways at different stages in an organization's history. [Mintzberg, 1990 b]

For the purposes of this essay the schools can best be dealt with under the two broader headings: the prescriptive, rational, deliberate and formal schools of planning and the incremental, emergent, learning schools.

a] The Rational, Prescriptive Schools of Planning

To understand all the schools of planning it is important to first understand the rational or prescriptive approaches to strategic planning. They not only came first chronologically but even critics like Mintzberg acknowledge that they also provide the basic concepts and the vocabulary that has helped to inform a good deal of strategic thinking. [Mintzberg, 1990 b].

The author has also adopted Mintzberg's approach [1990 a & b] and concentrated on the design school and the work of Andrews to introduce the prescriptive or rational schools. For Andrews the word "strategy" implies a conscious and systematic rather than haphazard or incremental approach to allocating the resources of an organization so as to take the maximum advantage of the opportunities in its environment.

The key concept of rational, prescriptive schools is that of match or fit. Find out what you are good at and match it with what the world wants and needs. It is based on the two pillars, external appraisal to detect the threats and opportunities in the environment and internal appraisal to identify the company's strengths and weaknesses. The manager then tries to relate opportunities to resources in the hope of coming up with the best possible strategy. One of the best definitions of strategy is given by Thomas [1988], "strategy is defined as an organization's activities and plans designed (1) to match the organization's objectives with its mission, and (2) to match the organization's mission with its environment in an efficient and effective manner. Strategic management is the process used to develop, refine, and implement actions in order to achieve the desired outcomes." p. 5.

Mintzberg [1990 b] identifies the central premises underlying Andrews's theory of strategic planning as:

- i] Strategy formation should be a controlled, conscious process of thought. Andrews would equate emergent strategy with erosion or drifting.
- ii] Responsibility for that control and consciousness must rest with the chief executive officer: that person is THE strategist.
- iii] The model of strategy formation must be kept simple and informal.
- iv] Strategies should be unique: the best ones result from a process of creative design.
- v] Strategies emerge from this design process fully formulated.

- vi] These strategies should be explicit and, if possible, articulated, which also favours their being kept simple.
- vii] Finally, only after these unique, full blown, explicit, and simple strategies are fully formulated can they be implemented.

Andrews [1980] himself presented his process succinctly in the following figure.

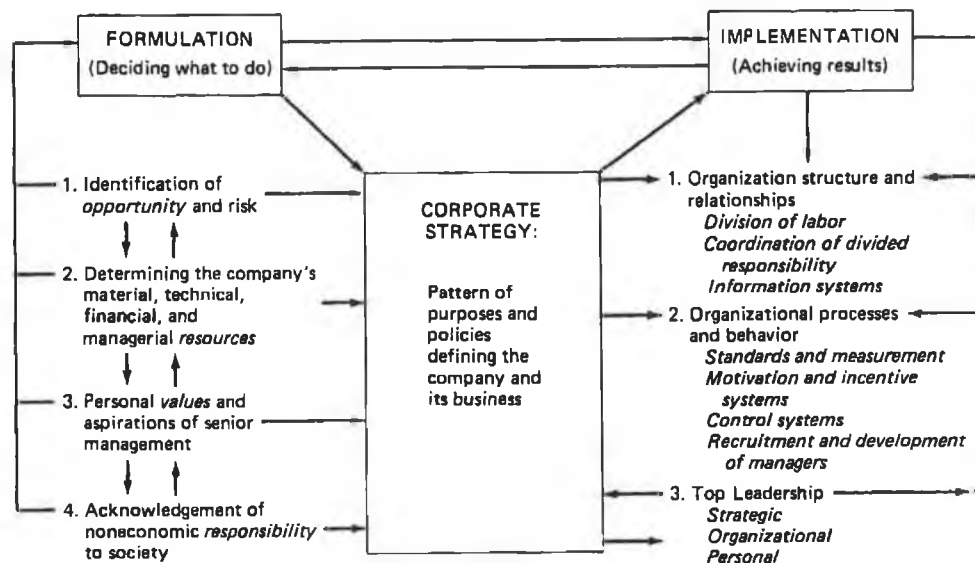


Figure 2.1 [Andrews, 1980, p. 28].

The other two prescriptive schools are the planning school inspired by Ansoff's, *Corporate Strategy* [1965] and the positioning school based on Porter's *Competitive Strategy* [1980]. Ansoff and his followers would have a much more developed and sophisticated approach to identifying an organization's strengths and weaknesses, opportunities and threats than the design school. He places much more emphasis on factors like: product-market scope, growth vectors, competitive advantage and synergy. This school grew to dominate the field in the 1970s and it seems that the majority of textbooks on strategic management would come from this school. [Steiner, 1979; Lorange, 1980; Harvey, 1982; Thomas, 1988]. Porter's background was in economics and industrial organization so the positioning school has developed an even more carefully structured economic analysis to develop strategy. Since the Missionary Society of St. Columban had more markets than competitors and little need for

detailed economic analysis, little use was made of the more sophisticated aspects of the planning and positioning approaches.

The Planning Process followed by the Rational School

It is important to understand the rational school's approach to strategic planning because: i] it was the founding school and to a certain extent still provides the basic concepts and vocabulary of strategic planning, ii] without an understanding of the details of the rational approach it is difficult to understand the later criticisms, and iii] most of the early stages of the Columban planning process were based on the rational model of planning. One of the most important influences on the early stages of the Columban process was Steiner [1979]. This section will be based on his process as it presents an accurate and popular model of the rational approach.⁵ c.f. Figure 2.2 for his illustration of the structure and process of strategic planning.

The process begins with the plan to plan. This is crucial part of the leadership's responsibility. If the planning process is to succeed it is important that all involved have a clear understanding of what the top management has in mind. The next four stacked boxes represent the situation audit. These will give the managers and planners the information about the environment and the internal resources of the organization that are significant for the growth and prosperity of the organization.

The next three boxes to the right show the gradual build up of the plan from clarification of the basic mission, purpose and objectives of the organization through the outlining of medium range plans to achieve these objectives to the even more concrete short term plans.

These plans once adopted must then be implemented and periodically reviewed or evaluated. The two directional arrows and the loops back are meant to show that all these elements constantly affect one another. The process is cyclical and never ending. For once a plan has been successfully implemented you have a new situation and company and must begin to plan again for the new opportunities and threats.

⁵ Others such as Lorange [1980], Harvey [1982] and Thomas [1988] could be used but their approach is basically the same. Coghlan [1987] is another member of the rational school who was perhaps even more influential in the Columban planning process but since his contribution was largely in applying planning to religious congregations discussion of his contribution will be left till later in the Chapter.

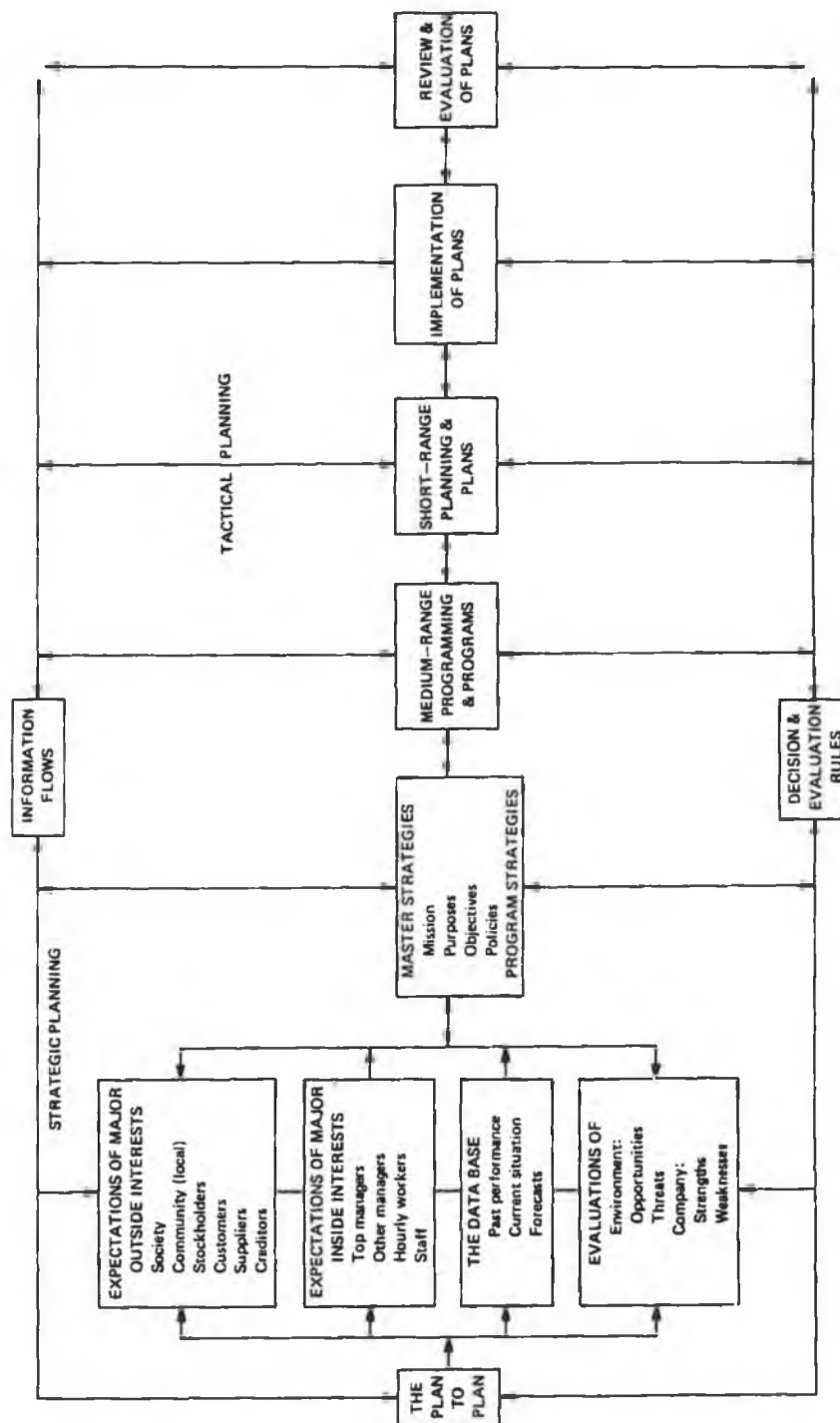


Figure 2.2 Structure and Process of Business Companywide Planning, [Steiner, 1979 p.17].

The boxes Information Flows and Decision and Evaluation Rules are meant to show that information must flow throughout the organization during the planning

process. The process of strategic planning should be interactive [requiring frequent dialogue with members of the organization] and iterative [it will not be perfect at first and needs to be frequently reworked].

The following are the key concerns that Steiner and others of the rational school pick out for more detailed comment.

Leadership

All the authors of the prescriptive schools of planning are unanimous that the chief executive officer [CEO] must be involved in and supportive of strategic planning for it to be a success. This is not a task to be delegated entirely to a planner. For Steiner, planning is top management's highest responsibility and the most frequent cause of the failure of planning processes is the lack of involvement of the organization's leaders. [Steiner, 1979].

It is at the beginning of strategic planning that top management must be specially involved. The CEO must initiate the plan to plan and be clear in his/her expectations. They should personally communicate the planning objectives to the organization. They must create the climate for planning [open-mindedness with regard to new alternatives; mutual respect for fellow managers and planners; the ability to face unpleasant facts and be honest about weaknesses, to accept critical evaluations and so forth]. [Steiner, 1979]. For that reason they themselves will need: flexibility, open-mindedness, the ability to listen, tolerance, patience and discipline. [Lorange, 1980].

Situation audit

The purpose of the situation audit is to identify and analyse the key trends and forces that could have an impact on the organization's future. The situation audit is fundamental to all planning. It is more than a stage of planning. It should become a way of thinking especially among middle managers so that the organization will remain flexible. [Steiner, 1979].

Basic mission.

One of the most important responsibilities of top management is to clarify the basic mission of the organization. It is only on this foundation that the more detailed objectives, strategies and tactical plans can be developed. [Steiner, 1979]. Unless there is a clear statement of basic mission to give consistency to the whole process

then it is likely that the firm will lack direction, morale will fall, resources will be wasted or diverted from the basic purpose into disparate projects and the organization will be less efficient and effective in fulfilling its mission. [Thomas, 1988]. The key role of the mission statement is to guide and to motivate employees. Later it will also be used to evaluate the success of plans and projects.

However, it is difficult to decide how concrete an organization should be in articulating its basic mission. The incremental, emergent schools of strategic planning often criticise the formal planners for being too specific and thereby blocking initiative and inviting resistance. The formal planners were also aware of this. [Steiner, 1979] notes that in business most statements of purpose are expressed at high levels of abstraction or vagueness. "Vagueness nevertheless has its virtues. These statements are not designed to express concrete ends but rather to provide motivation, general direction, an image, a tone, and/or a philosophy to guide the enterprise." p. 160 Excessive detail could: rally internal opposition, stifle creativity and participation by lower managers, close off legitimate markets and make the firm too rigid. Steiner is doubtful about the usefulness of writing down the basic mission except for larger organizations where it is necessary to crystallise the focus.

From long-range objectives to detailed plans

It is very important for effective strategic planning that these abstract, positive, and often vague mission statements be developed into more concrete goals or objectives. Only when they are made concrete can people in the organization understand exactly what they are supposed to be achieving. Objectives are part of the increasing specification of mission statements that will eventually lead to a plan. Thomas has described objectives as "the targets or intermediate goals needed to translate a firm's mission statement into specific, concrete, measurable terms. Objectives represent milestones in the firm's implementation of its chosen mission. Objectives frequently include (1) the desired state or condition, (2) an index for measuring progress toward the attribute or desired state, (3) a target to be achieved, and (4) a time frame within which the target is to be achieved. In other words, objectives specify 'what' is to be achieved and by 'when'. How objectives are to be accomplished is the focus of planning activities." [Thomas, 1988 p. 7f]. He gives an interesting diagram which clearly illustrates the progression in strategic planning.

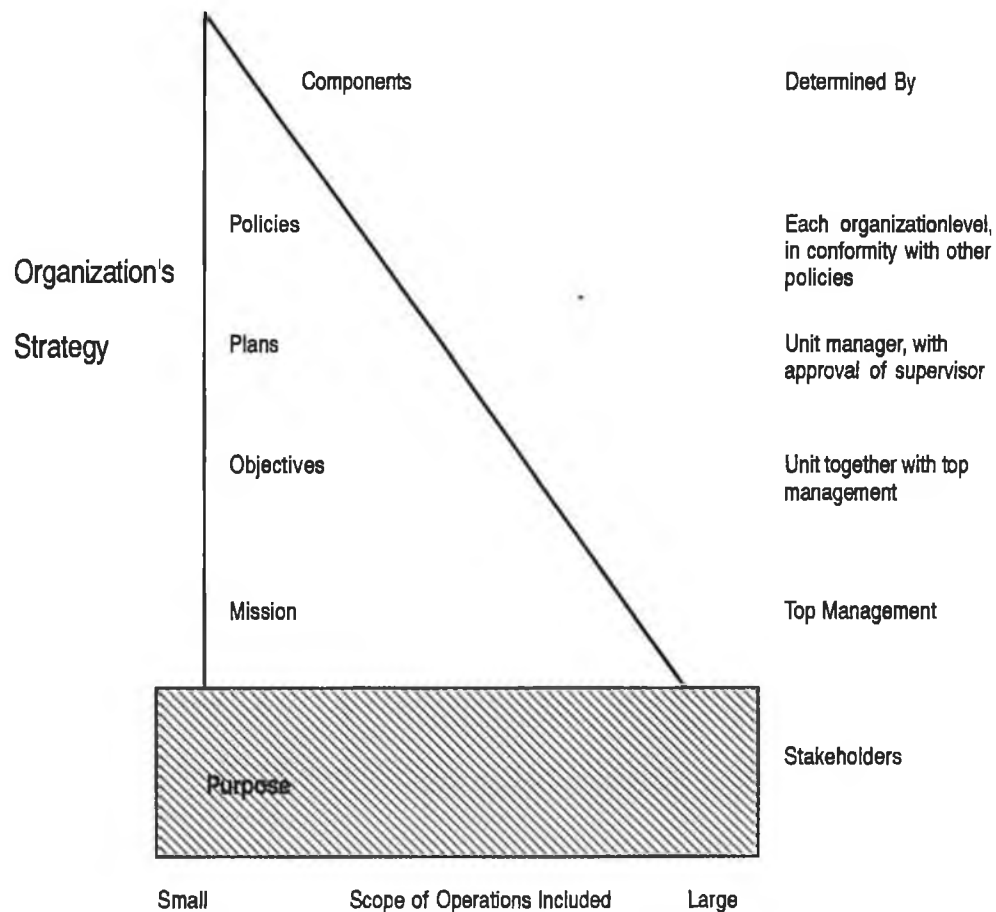


Figure 2.3 . Components of a Strategy. [Thomas,1988, p. 8].

Steiner outlines a number of criteria for objectives. They should be suitable, measurable over time, feasible, flexible, motivating and understandable. They should receive managerial commitment. People should participate in formulating them. Finally, they should be limited in number and linked. [Steiner, 1979].

Implementation

Implementation is key to the success of any organization for a plan is valueless until it is implemented. However, implementation is complicated and must involve appropriate changes in the structure of the organization, in the culture, control and communication mechanisms and in the reward system. "The implementation process involves both differentiation, the breaking down of plans into basic elements, and integration, the coordination of diverse functions into cohesive action." [Harvey, 1982 p. 258]. 1) Differentiation. The key tasks and sequences of steps needed to implement the plan must be identified and decided upon. People must be appointed to these various tasks and given a thorough understanding of what they

are expected to do. The resources, physical and human, should be made available. A time table for each task should be decided upon. Motivation and incentive systems set up. ii] Integration. Appropriate systems to coordinate the efforts of all the individuals and groups involved must be devised and implemented. A system which will provide managers with the information they need established. Training programmes to improve managerial and worker capability in making and implementing plans should be held. Above all the top management must work hard at guiding, motivating and integrating all the members of the organization to successfully implement the plan. [Steiner, 1979; Harvey, 1982].

Overcoming resistance

Steiner [1979] in a chapter entitled, *The Human Dimension of Implementation*, reminds us that strategic planning often provokes resistance because planning: i] alters personal and work relationships; ii] changes information flows, decision making and power relationships; iii] highlights conflicts in organizations; iv] introduces risks and fear of failure for managers; v] places intellectual demands on managers; vi] stimulates authority conflicts; and vii] makes people feel uncomfortable because of the uncertainty involved in deciding, planning and implementing.

He recommends a number of ways of overcoming anti-planning biases. Management should a] recognise the problem and try to minimise it; b] lead the planning process by providing a conceptual rationale and ensuring the operational roles are adequate; c] only introduce planning after considerable discussion; d] not ask people to do the impossible; e] compose all committees with care and f] reward effective planning. [Steiner, 1979].

It will also be extremely difficult to successfully implement a plan which is at serious variance with the culture of an organization. It is important that the leadership of an organization work carefully, sensitively and systematically to change its culture so that it will be more supportive of the new plan. "Organization effectiveness can be increased by creating a culture that achieves organizational goals and at the same time satisfies members' needs." [Harvey, 1982 p.247].

Structure

A good organizational structure will not guarantee good results but a well-conceived strategic plan can be thwarted by a structure that does not provide the necessary

authority and resources to the people chosen to implement the plan. It is crucial that there is a direct relationship between planning, control and structure. [Steiner, 1979; Harvey, 1982 and Coghlan, 1987]. Responsibility, authority and resources need to be assigned within the structure so as to facilitate the new strategic thrusts of the organization. According to Daft [1986] the four key components in the definition of organization structure are: i] allocation of tasks and responsibilities to individuals and departments; ii] reporting relationships, levels of hierarchy, span of control; iii] grouping of individuals into departments and departments into the organization; iv] communication, co-ordination, integration in vertical and horizontal directions. If a plan is to be successfully implemented it is important that adjustments are made to all these components so that the structure supports the plan.

Evaluation and control

Evaluating the performance of an organization is an integral part of the strategic management process. It is the only way an organization can know how successful it has been and what modifications need to be made to its strategic plans. The focus of managerial control is on results. Control seeks to ensure that an organization is actually producing the desired results. The basic control process involves three steps: establishing standards, measuring performance against these standards and correcting deviations from the standards. [Steiner, 1979; Harvey, 1982, Thomas, 1988]. They emphasise the importance of having some factual measurement of the actual performance and the organization.

Communication

Shared knowledge of the organization's goals and good communication are essential for the effective and efficient running of any organization. Throughout the planning process it is crucial that i] top management clearly communicate to the members the purpose of strategic planning and the organization's mission and long term objectives; and ii] that there is adequate flow of information so that the situation audit will be valid and the decisions, implementation and evaluation correct. The communications system keeps members informed and acts as a motivating force, building up group ownership and co-operation. Shared knowledge of the goals of an organization is essential for an effective and efficient organization. Leaders are responsible for the development and maintenance of communication and agreement within an organization. However, they should be careful to balance communication of information with information overload.

Motivation and reward

Finally, organizations give rewards or incentives to individual and departments who most successfully implement the organization's plans. These rewards can be of various types ranging from the more extrinsic rewards such as: pay, promotion, fringe benefits, job security, stock options, generous budgets through to more intrinsic rewards like recognition, praise, more interesting work, satisfaction, development of professionalism and greater powers of discretion. It is important that there be adequate rewards for long-term performance as well as short term results or the organization's long-term future might be put in jeopardy. [Lorange, 1980]. The incentive system should be designed to encourage accurate reporting of results. [Steiner, 1979; Lorange, 1980]. Finally there should be a proper balance between extrinsic and intrinsic rewards. Both have their place. Most enjoy the extrinsic rewards and they are especially appropriate where routine tasks predominate and tight control is needed but where imagination, creativity, professionalism and initiative are required the more intrinsic rewards are also important. At this end of the spectrum motivation often comes from satisfaction in a good performance. [Steiner, 1979].

The advantages of strategic planning

Steiner [1979], Harvey [1982] and Thomas [1988] refer to a number of studies indicating that firms that plan strategically outperform firms that do not. Some of the particular advantages the rational planners would identify with strategic planning are:

- i] Strategic planning gives direction to an organization. For Steiner [1979] "formal strategic planning asks and answers some key questions in an orderly way, with a scale of priority and urgency." p36. Without planning the urgent can drive out the important. [MacMillan, 1986].
- ii] Strategic planning introduces a new set of decision forces into an organization that prepare it to face future challenges. [Steiner, 1979].
- iii] Strategic planning develops the management skills of the organization and provides useful opportunities for systematic learning by forcing managers to ask and answer the type of questions that managers must deal with. [Steiner, 1979; Lorange, 1980; Thomas, 1988].

iv] A well-organized planning system is an extremely useful communications network, fostering discussion and exchange among all levels of management. [Steiner, 1979; Thomas, 1988].

v] Strategic planning encourages managers to look at the system as a whole and can help promote the better integration of the company. [Harvey, 1982].

vi] Strategic planning creates a standard against which to measure all short-term, decisions. [Steiner, 1979].

vii] Finally strategic planning assists in the allocation of discretionary resources. [Thomas, 1988].

b] The Incremental, Emergent or Learning Schools

The rational, prescriptive schools were popular in the 1960s and 1970s but as time went by and the situations facing most organizations became more dynamic, growth more problematical and change more necessary, experts started to question whether the rational, intentional control proposed by planners of the prescriptive schools was possible. Could the future be foreseen with any accuracy; could the mind of even the most brilliant CEO hold all the information; did successful leaders or managers actually operate in such a formal, stylised way; did implementation only start when plans were fully formulated and did not fully articulated plans create rigidity and resistance? As experts increasingly came to view organizations as social systems the emphasis in strategic planning turned away from rational, intentional pre-planned approaches to stressing learning, incrementalism, human creativity, flexibility, entrepreneurship and vision. The number of critiques is large and diverse. Mintzberg [1990 b] classified them into seven different schools. The following are the major critiques.

Wrapp

The earliest criticism of formal, rational, prescriptive planning was of the image of leadership it presented. Wrapp [1988] could not reconcile it with his experience of day to day managers and the way they actually made decisions. He believed: i] it is impossible to set down objectives that will be relevant for any reasonable period of time; ii] it is impossible to state objectives clearly enough to be understood by all;

and iii] detailed policies complicate matters by raising internal resistance. Therefore he believed *Good Managers Don't Make Policy Decisions*, but:

- keep well informed and keep open the information pipelines, especially on the informal level;
- focus their time and energy, taking on only a limited number of significant issues;
- play the power game, working out where the blocks and the support will be and developing a good sense of timing;
- practise the art of imprecision, because it is not possible to be precise over the long term. They keep the options open believing policies evolve over time. They give a sense of direction with open-ended objectives;
- muddle with a purpose. They don't push total packages but spot opportunities and relationships in the stream of operating problems and decisions.

Loasby

Another early criticism came from Loasby in his article, *Long-Range Formal Planning in Perspective*, first published in 1967. While acknowledging the numerous advantages of strategic planning he questioned whether because of too formal a process of strategic planning you would: miss the dangers you do not foresee; become less flexible because of a plan set in stone; block fresh thought and imagination; over-control managers; and obscure rather than illuminate the necessary uncertainty there is in the future of any company. He was extremely doubtful about the advantages of long-range planning and advised leaders and managers to do as little as possible and instead to try to develop a flexible organization that can make quick decisions. [Loasby, 1988].

Lindbolm

An even more important critic was Charles Lindbolm who in 1959 published a provocative article, *The Science of 'Muddling Through'*. Lindbolm's thesis violated almost every premise of rational management or planning. He suggested that in reality policy-making is a messy and complicated business where managers can not possibly hope to do much more than to react to crises as they come up. Lindbolm elaborated his theory of "disjointed incrementalism". He saw policy-making as serial, remedial and fragmented. Managers solved problems with little regard to

ultimate goals. He saw the policy-maker as "a shrewd, resourceful problem-solver who is wrestling bravely with a universe that he is wise enough to know is too big for him".

Quinn & Logical Incrementalism

Later Quinn was to take up Lindholm's criticisms. He agreed with Lindholm on the incremental nature of the process but insisted that it was logical and not disjointed, incremental and not piecemeal. Managers consciously and proactively move the organization forward in incremental steps towards their vision of the future. Quinn called the process logical incrementalism. He regards strategic planning more as a process than a plan. The strategy is the final outcome of all the interactive learning, coping, innovation and building of consensus rather than something that can be fully formulated and then implemented. All these processes build the organization's capability to face the future and organizational capability is much more important than a plan.

Quinn's manager does not face the same responsive organization that the formal planners seemed to deal with. He pictures the manager as the shrewd politician working to overcome resistance, build consensus and manage coalitions. The logical incremental process suggested by Quinn includes the following steps:

- i] Create pockets of commitment by testing ideas, providing broad goals, the proper climate and appropriate resources; allowing initiatives; building on successes and challenging at the appropriate time.
- ii] Avoid pushing for consensus too early. This will keep people onside and open to all the possible alternatives. It will also avoid early failures which will undermine everyone's confidence in strategic planning.
- iii] Subtly eliminate alternatives once a strategy has been agreed upon.
- iv] Focus attention on consensus and commitment.
- v] Empower champions to feel responsible for the new strategy and nurture it along to success.

vi] Develop strategies incrementally, but not piecemeal. It is the responsibility of central management to see that although strategies may be developed incrementally, they must be made to fit together in a unified, integrated and cohesive whole appropriate to the environment.

vii] Recognise continuing dynamics. Executives must gain consensus and support for the new strategy, but in a way that allows for room to modify or terminate the strategy if necessary. [Quinn, 1980]

Quinn believes that implementation does not have to wait till the strategy is fully formulated. Both go hand in hand and help to build up momentum for change, for innovation and for learning. He recognises a number of good results from planning. It: i] provides a discipline forcing managers to look ahead carefully; ii] requires rigorous communication about goals and the allocation of resources; iii] stimulates longer term analysis; iv] generates a basis for evaluating and integrating short-term plans; v] lengthens time horizons and protects R&D; vi] raises the comfort levels of managers; and vii] creates the psychological backdrop about the future against which managers can calibrate short-term decisions. In general the advantages of strategic planning are linked more to the process than to the actual plan. However, there are times when it is advisable to be specific in formulating your goals: in times of major transitions, after a crisis and when you want to precipitate action. [Quinn, 1988].

The Mintzberg - Ansoff debate

Perhaps the most vocal critic of the formal, rational and prescriptive schools of strategic planning is Mintzberg. In 1990 he wrote an extensive critique of the rational approach to planning entitled, *The Design School: Reconsidering the Basic Premises of Strategic Management*, in the *Strategic Management Journal*. [Mintzberg, 1990 a]. Mintzberg's major criticisms are:

i] because of the highly stylised, formal and rational nature of their planning processes they have denied themselves the chance to develop.

ii] because of its promotion of thought independent of and prior to action it has denied itself the opportunity to learn. Mintzberg doubts if any organization can determine its strengths and weaknesses or any other major

part of its plan independent of trying to put it into practice. To plan we need to learn from both action and reflection. He is critical of the rational planners' tendency to separate formulation from implementation. It detaches thinking from acting the combination of which provides the organization the only real opportunity it has to learn and to adapt in rapidly changing times.

iii] he can not accept that structure should follow strategy. His understanding is that structure plays a significant part in determining which strategy the organization can follow while at the same time it is important that adoption of a new strategy will result in and should be supported by a change in structure. However, the possibilities will be limited by the present structure. "We conclude, therefore, that structure follows strategy as the left foot follows the right in walking. In effect, strategy and structure both support the organization. None takes precedence; each always precedes the other, and follows it, except when they move together, as the organization jumps into the new position." [Mintzberg, 1990 a p.183].

iv] he believes that making a strategy explicit often promotes inflexibility. Mintzberg is particularly concerned that in times of increasing unpredictability it is impossible to accurately foretell the future and explicit formulation of a strategy might bring the learning process to a premature closure, would act as blinders and might give a false sense of understanding.

One of Mintzberg's major strengths is a wonderful facility for identifying images that powerfully convey his criticisms and present his ideas. Unfortunately, it is also one of his weaknesses because, although his images and generalisations are telling and basically accurate, they are often open to criticism in detail and he tends to generalise too much. Ansoff replied in *Strategic Management Journal*, Vol. 12, 1991 and argued with much of the detail of Mintzberg's argument. He claimed Mintzberg was inaccurate in his details, in his methodology of picking on Andrews and then generalising across the other formal planners, in picking on dated texts and then denying growth and development to the school and so forth. He is particularly critical of Mintzberg's tendency towards 'proof' by sweeping assertion. This is probably an accurate comment on Mintzberg's style of argument. Ansoff is correct in criticising the extreme but logical outcome of Mintzberg's argument that strategy should never be made explicit and can only be formulated in predictable

environments. There is little need for strategy at that time and most managers try to predict even in times of rapid change. That is their job even though they should remain, humble, tentative and open. In the event, Ansoff's reply did produce more guarded conclusions from Mintzberg. "We both know that we shall get nowhere without emergent learning alongside deliberate planning." And he accepts Ansoff's idea of 'strategic learning', cognition-trial-cognition-trial. "You call it 'strategic learning'. I have no problem with that so long as you don't pretend it can be formalised. And in return I'll promise never to claim that planning shouldn't be formalised." [Mintzberg, 1991 p.465].

It would probably not be productive to report the debate much further. There will be some more critical comment in Chapter 5.

Mintzberg - crafting emergent strategies

Mintzberg's facility for insightful images is best seen in his article, *Crafting strategy* [1987]. He likens strategic planning to the work of a potter. The potter at her wheel has a vision of what she wants to create but no detailed plan of how to achieve it. What she does have is her skill and experience, and she draws on these to shape the wet clay into her vision. However, the vision may change as it is implemented and the pot emerges from this combination of past experience, present competence and vision. Through the image of the potter Mintzberg makes a number of valuable points. i) Strategies are both plans for the future and patterns from the past. Often it is only possible to discern the pattern in an artist's work or in an organization's development as we look back over the past. ii) Strategies need not be deliberate - they can also emerge as they do with in the potter's hands. This allows action to drive thinking so that formulation and implementation merge. Deliberate planning and learning go hand in hand or as Mintzberg prefers to put it "strategy making walks on two feet, one deliberate, the other emergent". iii) Effective strategies develop in all kinds of strange ways. The potter's errors often become opportunities. Managers need to develop within the organization's grass roots a capacity to learn. iv) Strategic reorientations happen in brief, quantum leaps. Ironically the very concept of strategy is rooted in stability, not change. Major shifts in strategic orientation occur only rarely, most of the time they pursue a given strategic orientation. Eventually, as the world changes a strategic revolution must take place. The manager's art is to recognise when the time is ripe. v) Management is an art. To

manage is to craft thought and action, control and learning, stability and change. [Mintzberg, 1987].

Pascale - the Honda effect

One of the studies most frequently quoted by the critics of rational, prescriptive planning is Pascale's, *The Honda Effect* [1988]. For years the success of Honda's efforts to take over a substantial portion of the United States motorcycle market had been explained by people like the Boston Consulting Group in terms of deliberate well-planned strategies. Pascale's interviews with the five Japanese executives involved showed that it was much more haphazard and opportunistic than that. He concludes, "we tend to impute coherence and purposive rationality to events when the opposite may be closer to the truth. How an organization deals with miscalculation, mistakes, and serendipitous events outside its field of vision is often crucial to success over time." [Pascale, 1988 p. 122]. He believes that the success of Japanese business firms should not be put down to the big brains of their planners and managers but to the little brains throughout the company who contribute incrementally to the quality and market position these companies enjoy today. Middle and upper management saw their primary task as guiding and orchestrating this input from below rather than steering the organization from above along a predetermined strategic course.

Hamel & Prahad - Strategic Intent

Hamel & Prahad also argue that the key to Japanese business success is not well thought out strategies, but the commitment of Japanese managers to create and pursue a vision of their desired future. They call this Strategic Intent. Strategic intent may be as short as Komatsu's "Encircle Caterpillar" or Canon's "Beat Xerox", but they believe it works. It does this by focusing the organization's attention on the essence of winning; motivating people by communicating the value of the target; leaving room for individual and team contributions; sustaining enthusiasm by providing new operational definitions as circumstances change; and using intent consistently to guide resource allocations. [Hamel & Prahad, 1989]. They are critical of western strategic planning because it limits thinking, resources, staff and possibilities.

Peters & Waterman, Kanter, and Handy

At the same time similar points were being made by Peters & Waterman [1982], Kanter [1989] and Handy [1989] in their studies of successful organizations and new

perspectives on management. Peters & Waterman in their book, *In Search of Excellence: Lessons from America's Best-Run Companies* [1982] identified eight attributes for excellence. 1. A bias for action; 2. Close to the customer; 3. Autonomy and entrepreneurship; 4. Productivity through people; 5. Hands-on, value driven; 6. Stick to the knitting; 7. Simple form, lean staff; 8. Simultaneous loose-tight properties. Similar points were made by Kanter in *When Giants Learn to Dance: Mastering the challenges of Strategy, Management, and Careers in the 1990s* [1989]. She argued that today's corporate giants need to learn to dance as nimbly and quickly as mice to survive in a rapidly changing world. They must slim down their structures around their core competencies to find synergy, form strategic alliances and encourage innovation and entrepreneurship within their organizations. On this side of the Atlantic, Handy in *The Age of Unreason* [1989] was also contending that in the future organizations will need to be smaller, more flexible and less hierarchical. Unlike Peters & Waterman and to a less extent Kanter, he did not believe in "one best way" and identified three generic types of organization which will dominate the future.

II. Some Specific Areas Needing Special Comment

There are two areas that all schools acknowledge as important and which may need further comment. They concern a) changing an organization's culture; and b) the quality of leadership needed for successful strategic planning.

a) Changing an Organization's Culture

As our understanding of strategic planning has developed people have become aware of the importance of an organization's culture in planning and in managing change. However, although almost every school talks of the importance of the organization's culture, it is not obvious how profoundly they understand its influence.

Schein [1985] defines culture as, "the pattern of basic assumptions that a given group has invented, discovered, or developed in learning to cope with its problems of external adaptation and internal integration that has worked well enough to be considered valid, and therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems". p.9 The organization's basic assumptions have worked so often they have come to be taken for granted by the members. They have dropped out of awareness and so cannot be questioned. This

illustrates the strength of their hold on the members. They have become the common sense of an organization and will in future unquestioningly define what is normal, practical and wise. Because of previous successes, the culture of an organization becomes the primary determinant of the success of future strategies. [Coghlan, 1987, 1988, 1989; Connolly, 1986].

Culture has often been compared to an iceberg. Its more explicit or overt manifestations: rites, customs, structures, symbols can be identified by the careful observer, but the majority implicit and covert aspects: the assumptions, taken for granted, implicit values and so forth, lie deep beneath the surface and are all the more powerful because of this.

Organizational Iceberg

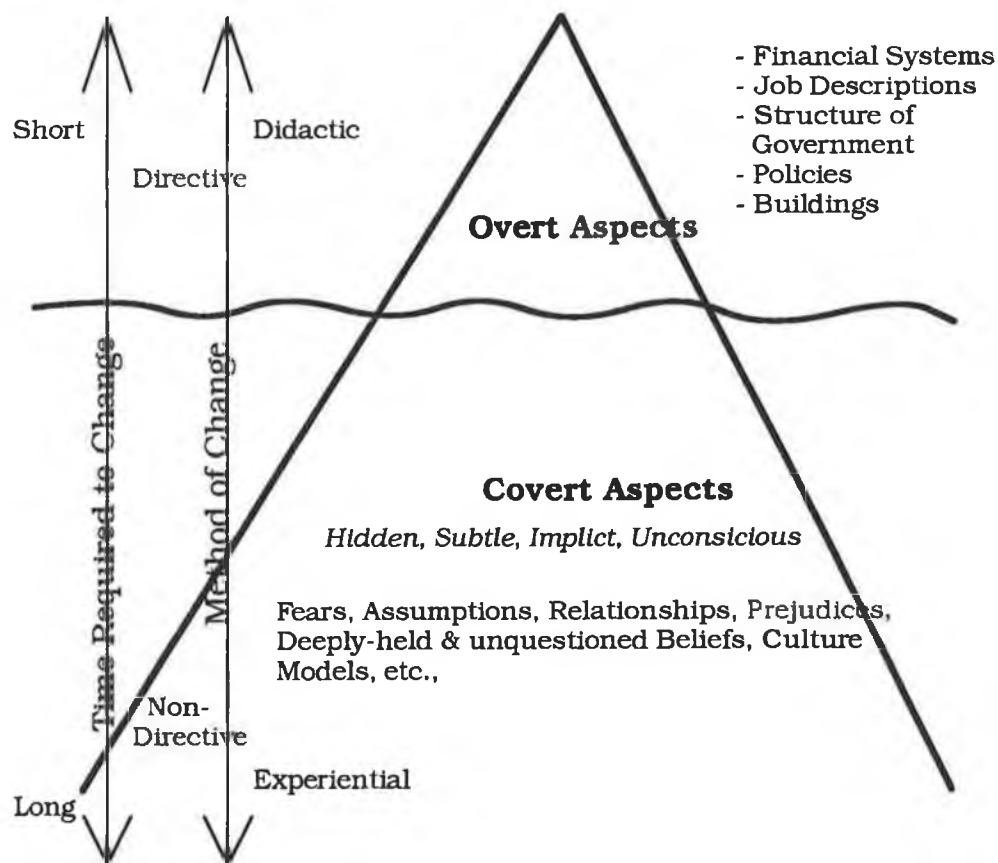


Figure 2.4 Adapted from Selfridge & Sokolik [1975]

As can be seen from the diagram, genuine cultural change will require a long time. Burnes [1992] quotes research claiming that it can take from six to sixteen years.

Many, Schein [1985], Mintzberg [1987], Pascale [1988], Hamel & Prahad [1989], Peters & Waterman [1982], Kanter [1989], Handy [1989] and Burnes [1992], believe that cultural change is the responsibility of leaders or senior managers. Schein [1985] would go so far as to claim that creating and managing culture is the only thing of real importance that managers do.

But how do managers or leaders go about changing an organization's culture? Schein [1985] believes that the first step is to understand the nature of the existing culture. This can be done by analysing the values that govern behaviour and uncovering the underlying, unconscious assumptions. Areas of particular interest are: processes of recruitment and induction of new members, responses to critical incidents, and the beliefs and values of the organization's "heroes". These findings should then be discussed with members, paying particular attention to anomalies. This analysis can then be a good basis for a strategy to change the organization's culture through the fostering of new symbols, visions, images, beliefs, values and styles.

Argyris also outlines a convincing theory of how to promote cultural change. Argyris does not talk specifically of culture but of the difference between the "espoused theories" and the "theories-in-use" that people actually operate out of. He graphically illustrates how individuals and organizations can trap themselves in "defensive routines" that are automatic and insulate our mental models from examination and lead to "skilled incompetence". He details a process of action, observation and intervention he uses to uncover our taken-for-granted and help free us for learning. The first level involves helping the members to become aware of the inconsistencies and gaps produced through one's behaviour. The second involves realising the dilemmas and paradoxes resulting from one's behaviour. The third involves learning how the actions of the first two levels combined to create group defensive routines and self-reinforcing patterns. The final level involves learning how all three previous levels combined to cause individuals to censor, distort or block out the information coming to them, rendered ambiguous and inaccessible proper communication and made change extremely difficult. [Argyris, 1983, 1990].

Finally, at times when radical cultural change is needed you may need new leaders without history and who do not have anything to defend. [Gummesson, 1991]. Burnes [1992] also highlights the paradox that those in the best position to change a culture are often those most inculcated with the old ways and they may have to be replaced.

b) The need for leadership

It was Selznick writing on *Leadership in Administration* in 1957 who first introduced some of the concepts that have since become foundational to planning. However, his principal concern was leadership. He saw institutional leadership as more than administrative management and believed that the primary role of the leader was the promotion and protection of values. Selznick [1988] It is ironic that in many respects the pendulum has now swung back to emphasising the need for leadership. Practically every author mentioned in this brief review of the literature has seen the role of the leader as crucial. Langley has gone so far as to suggest that, "The call for strategic planning is really a plea for leadership and direction." [Langley, 1988 p.49]. There are two aspects of leadership that are becoming increasingly important in the literature and deserve more detailed comment.

Organizations need leaders more than managers

It is becoming increasingly obvious that organizations need leaders rather than managers if they are to be successfully renewed and revitalised. Two people who have written on the difference between leaders and managers are Zaleznik and Leavy. Zaleznik [1992] believes that the difference is psychologically based. They are two different personalities. Managers are people who prefer order and control. They are reactive, problem-solvers and work within the system. They like to belong and work with a wide range of people but do not have deep relationships. Leaders are the reverse. They have a greater tolerance for chaos and lack of structure. They do not have the same need to belong and are often intense people to work with. They are problem-finders and transformational rather than transactional leaders because of their capacity to create vision. Zaleznik suggests that they are best formed through apprenticeships in one-to-one relationships with older successful leaders. Leavy [1992] also believes that it is the leader's capacity for generating vision that separates him or her from a manager. His analysis of two Irish leaders, Dr. Tom Walsh and General Michael Joseph Costello, showed that such leaders were rare people of deep conviction, passion and a sense of history. They were able to motivate other members of their organizations to play their part because of their

capacity to generate visions connected with the deeper values and larger purposes than the merely economic.

Leaders as builders of learning communities

Senge also highlights the need for leaders who can generate vision. He believes that vision-driven change is to be preferred to problem-driven change. The motivation for the latter disappears the moment the crisis is past but the motivation for vision-driven change is internal and persists into the future. Senge notes that the rate at which organizations learn may become the rate at which they will survive. He points out that leaders are responsible for generative rather than adaptive or problem-solving learning. The key to this lies in creating a vision which in turn will create a tension between what is and what might be. The leader as designer tries to create a vision and design a learning organization. As teacher, the leader helps to define the current reality and to bring to the surface people's mental models of important issues. He or she also tries to get people thinking systematically. Finally as steward, the leader is servant and steward of the people they lead and of the larger purpose or mission of the organization. Senge [1990].

III. Other Research Projects

A search of DIALOG [Dissertation Abstracts Online], July 1991, revealed no research dealing with an organization similar to the Columbians. The closest was research into planning practices in institutions of Higher Education and these only make general points covered in the wider review of the literature.

A search of ABI/INFORM, February 1993, produced similar results. A search under the subject "strategic planning" produced 6909 articles, under "strategic planning" and "nonprofit organizations" produced 58 articles, "strategic planning" and "religious organizations" produced only 2 articles and "strategic planning", "international" and "religious organizations" none. The two articles on strategic planning in religious organizations related to fund-raising programmes for Evangelicals and for Covenant House in New York. Although there were no similar programmes of strategic planning among the 58 articles concerning non-profit organizations there were some interesting points. The most helpful article was "Are You Ready for Strategic Planning?" in *Nonprofit World*, 1990. In this article, Kerry Laycock points out that in the rush to become involved in strategic planning many

non-profit organizations fail to: a) consider how appropriate it is for them, b) diagnose their own needs, and c) prepare themselves. He identifies four key questions an organization must ask itself before beginning a process of strategic planning: i) Is the organization strong and stable enough for this undertaking? ii) Is the need for change recognised? iii) Are the necessary resources of time, money and personnel available? iv) Is there enough commitment?

However, since most of the research is geared to strategic planning in business organizations, colleges, health services, semi-state bodies and so forth, there were special difficulties that did not seem to be taken into account in previous research. These will be dealt with in Section IV.

IV. Special Questions for Planning in an International, Not-For-Profit, Religious Organization

The Missionary Society of St. Columban is an international, not-for-profit, religious organization. Each one of them poses special questions for strategic planning.

a) International Organizations

A major difficulty faced by international organizations when planning is the difficulty of communicating across vast distances and across a high degree of differentiation caused by different cultures, apostolates and circumstances. [Harvey, 1982, Thomas, 1988]. It is hard for the central management to meet the various national managers face to face to prepare and motivate them for planning. Most communication has to be done by mail and the volume of complex information that must be exchanged makes the task very difficult. [Harvey, 1982]. There is little opportunity for the seminars that would normally be necessary to ensure that middle management understands what is required of them and is enthused about the process. Isolation, lack of training and reliance on communication by mail means that the process is extremely dependent on the skills and attitudes of national directors. Making adjustments and giving feedback is also troublesome.

In addition, groups in different countries can have vastly different experiences of and attitudes towards planning. They are frequently moving in different directions and at different rates. Some have had experience of planning. For others the sudden introduction of a full-blown process of strategic planning comes almost as a culture

shock. There can also be strong resistance to planning in some cultures or circumstances. Lorange [1980]

A multitude of social, political, economic and cultural differences makes the setting of common objectives, the assessing of the internal and external environment, integration, planning, implementation and evaluation extremely difficult. The range of strategic alternatives is wider for international organizations making strategic choices all the more difficult. [Harvey, 1982, Thomas, 1988]. For example, in the case of the Columbians, the demands of mission in countries as varied as Korea, Chile, Britain and Fiji make it difficult to agree on a common mission statement. Comparison is problematical and it is difficult for the General Council to decide which mission should have precedence over the others with regard to personnel and material resources. International organizations have the further difficulty that many of their people are difficult to move between countries because of the demand of learning new languages and cultures.

However, international organizations may need strategic planning as much if not more than national organizations. Their competing but highly varied demands are more likely to lead to fragmentation, drifting and lack of direction. Hence it is crucial that top management provides the various countries with clear criteria with which to plan and with adequate information on the state of the organization as a whole. But top management needs to be diplomatic in the way it initiates and manages strategic planning or it will be seen by middle management in the various countries as another case of centralisation. [Lorange, 1980]. It also needs to develop more regional autonomy. Detailed long distance management is just not possible. Each subsidiary needs to be planted in local soil, Ohmae [1989], i.e., related to local concerns and having freedom for local initiatives and creativity. It is the job of central leadership to provide the central vision and values that hold the organization together and the training and exchange between countries that will further cement the sense of common purpose.

b) The Not-For-Profit Sector

According to Steiner, politics dominates decision-making in the not-for-profit sector [NFPS] whereas economics dominates business decisions. Not-for-profit organizations tend to be more pluralistic than commercial organizations. There are many interest groups trying to influence decisions in the NFPS. Mission statements,

purposes and objectives are therefore vaguer. The criteria for decision-making are less concrete. Implementation is also more difficult because of less clarity in the lines of command. [Steiner, 1979]. They are also likely to have quite a number of professional members and their professional loyalties can undermine their allegiance to the organization. [Thomas, 1988].

These characteristics complicate strategic management. Conflicts about goals restrict planning possibilities. Divergent goals allow employees to undertake competing and sometimes conflicting activities in the belief that they are contributing to the organization. Ambiguous operating goals create opportunities for goal displacement and internal political differences. Professional values and traditions limit the speed at which professionals change behaviour in response to changing social needs and the demands of a new plan. Vague mission statements and objectives make it difficult to communicate to members what the organization is meant to achieve. [Thomas, 1988].

c) Religious Organizations

Finally, religious congregations also have special characteristics that must be taken into account by leaders and planners.

Religious congregations are primarily concerned with discovering, affirming and promoting the holy, transcendent, sacred or ultimate meaning of life and with establishing community. Central to religious congregations are faith, the sense of call or vocation and commitment to life-long apostolic service. These values are considered essential. They determine organizational processes and become the principal criteria in training new members, selecting leaders, choosing apostolates, decision-making, planning, life-style, evaluation and so forth.

Religious congregations have difficulty in writing clear, definite mission statements. [Alvarez, 1984; Guy, 1988; Guy & Hurley, 1990 a & b]. This is because of the lack of specificity and intangibility of their goals and the idealism of their members. The combination leads to a great variety of possible interpretations of what the congregation is about. This ambiguity limits the leader's ability to create a unifying vision and to decide priorities. It also makes it impossible to judge the effectiveness of a congregation because of the lack of a yardstick. [Guy & Hurley, 1990 a & b]. Members are reluctant to see cutbacks made in their apostolates because more than

their work is at stake. They have joined the congregation for life. Their apostolate is not just as a means of earning a living for a limited period of time. They see their apostolates as a vocation more than a job and since they are celibate and often live where they work their apostolate colours their whole outlook on life. The mission or identity of their congregation and their particular apostolates are often more personal to them than they would be to members of a business company.

Alvarez found many religious congregations either have no mission statements or have ones that are not very helpful because they neglect hard questions like deciding i] a future direction for the next 10 - 15 years, or ii] who are to be the preferred "consumers" of the congregation's ministry. These are the difficult questions for the congregation because they have real implications for the lives of the members and for the distribution of personnel and other resources. Religious try to avoid conflict in deciding concrete directions for the future. However, "conflict avoided at this time is simply postponed until the next point of decision making, and the mission statement, the object of months of development, turns out to have very little real value to the group". [Alvarez,1984 p.30].

Guy in her analysis of the mission statements of 6 Irish congregations came to similar conclusions. Mission statements because they are normally general, positive statements are open to many interpretations. However, without further specification it is impossible to determine whether a congregation is being effective. She argues that two further steps are needed: i] a long-range statement of what the congregation wants to accomplish, and ii] the establishment of objectives that are short-range, specific, challenging but realistic. [Guy, 1988].

For religious congregations motivation and reward systems are especially complex as they do not have the usual avenues of financial reward. Coghlan found that, for religious, motivation comes from approval and from the assignment of key resources, especially personnel. But the strongest "motivation for a religious is grounded in the sense of vocation and mission. It is inseparable from the sense of personal calling from God and from a deep commitment to the particular religious order that is a fundamental life commitment." [Coghlan, 1987 p.49]. For that reason leaders in religious orders and missionary societies will not be successful in promoting strategic plans unless they can show the intimate connection between the new objectives and the fundamental mission, religious motivation and history of the

organization. Of course, rewards like more personnel, generous budgets, more discretionary power and approval are important but the strongest sense of motivation comes from a sense of being faithful to the mission of the congregation and God's call .

Members of religious congregations are generally sceptical about the methods of big business. They distrust the profit motive as being far removed from the ideals of self sacrifice that are supposed to motivate religious. They feel that it is impossible to measure the value of their work which is often intangible or "supernatural". Finally, because of they believe God frequently works in ways beyond human understanding, they resist planning and prefer to allow for freedom of the Spirit.

There is some truth in all these claims but there is also an element of escapism. Not everything they do is immeasurable. Often appeals that their work is immeasurable is a flight from accountability. It is possible to plan and still leave room for freedom for the Holy Spirit. Actually confronting the dramatic disproportion between the demands of the environment and their small resources may require a good deal more faith and courage than just drifting along.

However, no leader or planner in a religious congregation can ignore the members' sense of vocation and be successful. "The rational, political, contingency approaches to decision-making of the secular arena are insufficient for the faith perspective religious bring to decision-making. Religious decision-making must be grounded in the faith on which mission and vocation are based. Discernment is the process that integrates prayer and decision-making, taking the process of making decisions beyond what is rational or political to the level of the sense of the promptings of the Holy Spirit." [Coghlan, 1987 p.47].

Discernment is an ancient practice in the Christian spiritual tradition. It was especially promoted by St. Ignatius, the founder of the Jesuits, who developed a practice of discernment as the basis of his Spiritual Exercises. The process of Christian discernment is meant to help an individual or community decide what in this particular situation they must do to follow Christ in the here and now. There is no fixed method but some of the essential steps would be i] to thoroughly research a question so that it can be phrased as clearly as possible, ii] to try to place this question in the context of what would best promote the Reign of God, iii] efforts to

get in touch with one's own image of God and with the congregation's history with all its blessings, iv] efforts to become aware of and, in as far as possible, free of your prejudices and fears, v] honest sharing with other members of the community of what has happened in one's prayer, vi] the decision and vii] more prayer and sharing to see how the decision rests with the community in order to confirm it.

Discernment, as a religious experience in decision-making, should be a core dynamic in strategic planning for religious groups. Placing the decisions in the context of God's call enables religious to overcome their normal prejudices and fears and is more likely to motivate and unite the congregation behind the decision.

V. A Model of Strategic Planning for Religious Organizations

Coghlan [1987] presents a simple model developed for strategic planning in religious congregations. It tries to take into account some of the problems peculiar to planing for religious congregations.⁶ [c.f. Figure 2.4].

Vision. The religious congregation or missionary society begins planning by clarifying for itself its Core Mission. This core mission is found in its Constitutions and its early history plus its most recent Chapter or Assembly documents.

Environmental Scan. The second phase is the Environmental Scan or analysis of the environment in which the congregation works. The congregation tries to identify the pastoral or missionary needs of the society in which it works and lives.

Internal Review. The congregation tries to make an assessment of its past performance and take a realistic look at its resources, physical and personal, both now and into the future. The review will have both a quantitative and qualitative dimension. It is an important and often neglected stage of strategic planning in religious congregations.

6 The Columbans used this model in the earliest stages of their planning process.

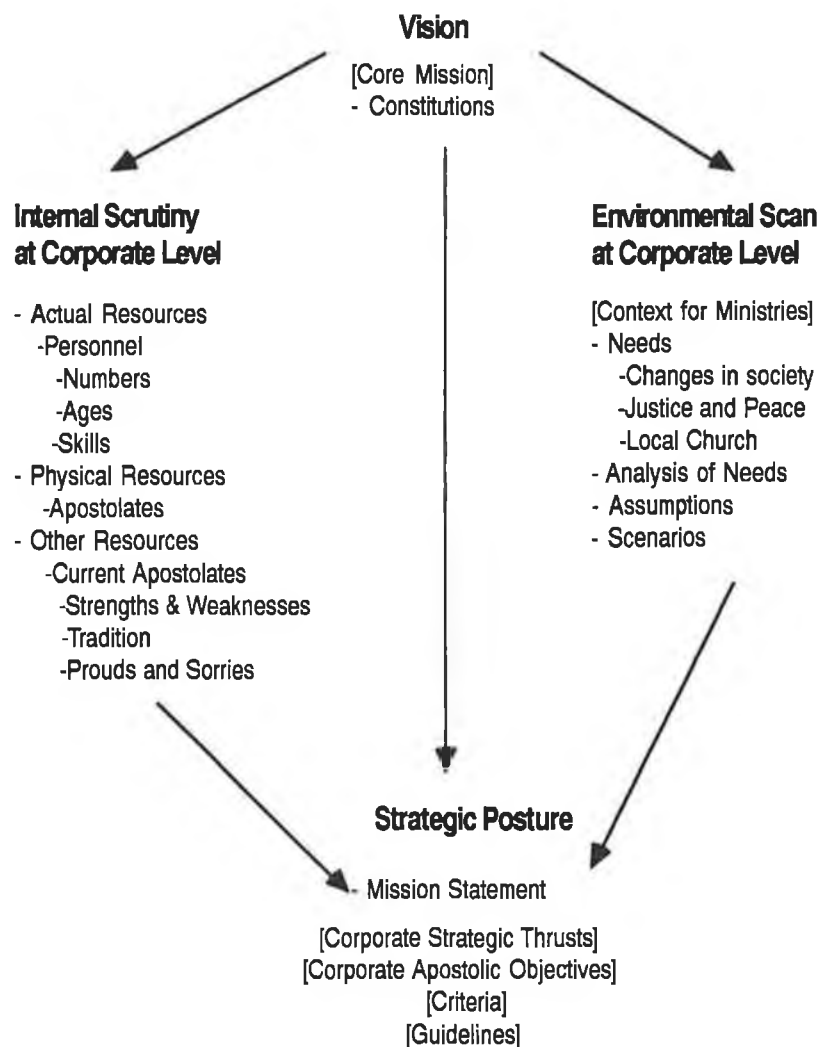


Figure 2.4 Strategic Posture in the religious order Coghlan [1987] p. 47

Strategic Posture. Strategic comprises the primary issues to be addressed in the next 3-5 years as derived from the integrated picture of core mission, environmental scan and internal review. Strategic thrusts should contain specific and meaningful planning challenges addressed to all levels of the organization and articulated in a way that will convey a sense of the critical tasks that every unit has to deal with.

"Typically, strategic posture in the orders studied was expressed in terms of criteria, numbering about four. Establishment of criteria is a way of pinning down the intangibility and immeasurability that Newman and Wallender pointed to as the ambiguous factor in not-for-profit enterprises." [Coghlan, 1987 p. 47]. All the ministries of the congregation are then assessed in the light of these criteria. The strength of

the corporate commitment will depend on the degree to which this particular ministry meets the criteria. Coghlan mentioned one congregation that categorised their ministries according to three levels of priority, 'growth', 'high maintenance' and 'low maintenance'. "Growth' apostolates were defined in terms of opportunities for new contemporary operations arising out of the strategic process and characterised by an input of younger personnel and clear fulfilment of province criteria. 'High maintenance' were areas where there was a traditional ministry that the province continued to value highly. With a reduction in religious personnel the character of these ministries would change, and they would be expected to adapt to the province's strategic criteria. The third category was that of 'low maintenance' which consisted of the ministries the province would continue to staff as long as it had personnel to staff them and were centres of valuable activity by members who would work in a way that their health and age permitted. These apostolates would be phased out gradually." [Coghlan, 1987 p. 48]. This process is also referred to as "colour coding". Growth apostolates are coloured green, high maintenance apostolates blue and low maintenance apostolates red.

It is not easy to identify which school Coghlan belongs to. In many respects his method, Core Mission - Environmental Scan - Internal Review ----> Strategic Posture is the formal prescriptive planning model. However, his end product is a strategic posture rather than an inflexible detailed plan, something much closer to the concept of strategic intent or vision championed by the emergent, learning schools.

Finally, Coghlan's study of strategic planning in five different religious orders found that "the concepts from the strategy literature are directly transferable, even in a non-competitive, non-commercial context". [Coghlan, 1987 p.50]. He also identified a number of common strands that made for successful planning in the five congregations he studied. The key ones were: i] Each order emphasised core criteria that became the focus of the different strategic activities. ii] Their strategies pinpointed key issues arising out of the core criteria and the needs of the environment. iii] Process was very important. Building a process of systematic reflection was a critical success factor. iv] Considerable time was devoted to consultation and consensus building. They needed a wide variety of top-down and bottom-up interaction and participation in defining the strategy. Consequently consensus and motivation were strong. v] All used task forces. vi] Organizational structures were adapted where necessary to facilitate the implementation of

strategy. vii] To be successful at planning one also needs to focus on issues of internal organizational maintenance, such as continuing education, care of the retired and elderly, community life. viii] It was crucial that the leadership played a clear role in owning the processes and in activating them in their formulation and implementation." [Coghlan, 1987 p. 50].

Introduction

This chapter outlines i] the important factors which determined the choice of methodology, and ii] the details of the methodology.

I. Important Determining Factors

There were three factors that influenced the choice of methodology for this thesis. They were the researcher's dual role, the need for a cyclical and flexible methodology and the actual history of the Columban process of strategic planning.

a] The researcher's dual role

It is important to remember that the author as Vicar General of the Missionary Society of St. Columban has been intimately involved in organizing all stages of the planning process. He helped design the process, review all the Regional Plans of Action and organise training in leadership and planning. In other words the author has been both researcher and senior executive. There are significant advantages and disadvantages to such a dual role. As Gummesson points out in his book, *Qualitative Methods in Management Research* [1991] the role of senior executive provides the most comprehensive access to the organization and its strategic issues. Of course, there are disadvantages to having a dual role. They mostly relate to possible lack of time, focus, objectivity and adequate theoretical background. [Gummesson, 1991]. The methodology of this thesis tries to make the most of the advantages while guarding against the disadvantages.

b] The need for a cyclical and flexible methodology

This study was more than a controlled experiment. It involved an actual attempt at strategic planning and demanded quite a deal of learning, relearning, adapting and reformulating as the process of strategic planning went on. This is consistent with the interactive and iterative nature of strategic planning [Steiner, 1979] and with the more process oriented understandings of strategic planning [Quinn, 1980 and Mintzberg, 1987]. Mintzberg has gone so far as to conclude, "we believe the starting point for research should increasingly be case and context as opposed to concept. We need to ask more questions and generate fewer hypotheses - to allow ourselves to be pulled by the concerns out there rather than by the concepts in here". [Mintzberg, 1990 b p. 208]. The research style of this study is akin to that of Action

Research where the researcher not only studies a social phenomenon but also participates and actively influences the course of events Argyris [1983] and Peters & Robinson [1984]. The approach required constant learning and adaptation. To that extent it did involve what Argyris [1983] calls double-loop learning. It can be represented as follows:



Figure 3.1

When it came to developing a methodology for this thesis the original inspiration came from experts in education research. [McGuigan, 1983; Burgess, 1985; Sherman & Webb, 1988]. It was only as more of the theory of planning was researched that it became clear that the methodology being used was largely that of Action Research.

c] A brief history of the Columban process of strategic planning

To understand the methodology of this thesis it is also necessary to know the history of the Columban process of strategic planning. The two are intertwined and interdependent. The process was as follows:

Phase 1. The Columban process of strategic planning was originally mandated by the 1988 General Assembly held in Pusan, Korea. The General Assembly meets once every six years and among other things evaluates the state of the Society and plans for the future. The 1988 General Assembly realised that given the changing demands of mission it was imperative that the Society review its present commitments. To ensure that the Society made the best possible use of its resources the General Assembly recommended that every Region/Mission Unit make an assessment of the missionary needs of its local church and of the Columban apostolates and resources. These assessments were to lead to a plan of action drawn up in accordance with their new priorities and, if necessary, to a restructuring of their present commitments. *Becoming More Missionary* [1988] #148-150. While the Regions/Mission Units were given the primary responsibility of carrying out the assessment and planning process, the General Council was called upon to initiate and coordinate it.

Phase 2. On 20th July, 1989 the General Council wrote to each Director reminding him of his responsibility to carry out this assessment and providing him with guidelines, *Assessment of Society Commitments - Guidelines from the General Council*. The General Council also summarised the Constitutional material that could serve as criteria [Core Mission] and recommended a possible process. It was then left to the various Regional Directors to develop a plan that would ensure the Society was as effective and efficient as possible in pursuing its mission in their country.

Phase 3. Over the next 6 - 12 months each Regional Director attempted with the help of his Council and members to review their resources, assess the missionary situation in their country and draw up a plan of action for the future. These plans were then forwarded to the General Council for review and comment. [These and subsequent drafts of the Korean, Fijian, Chilean and British plans along with related correspondence are available on request.]

Phase 4. The General Council reviewed each plan of action as it arrived and returned it to the Directors with comments. With the exception of Chile, most of the first drafts were poor. Many Directors did not appear to understand what was required of them. The environmental scans were poor. They seemed to lack a method of analysis to make sense of all the data they had collected. The internal review of Columban resources was also weak. Regions avoided coming to grips with the very real decline in personnel. There was a pronounced reluctance to prioritize and to make cutbacks. The local leadership often did not lead. They preferred to let the assessment take its own course, rather than give direction to the process. Consequently what emerged were vision statements, directions for the future rather than concrete plans of action.

The General Council decided that a Second Phase of planning was required. They wrote to the various Directors stressing the need for detailed plans of action with clear, concrete objectives and a definite calendar.

Phase 5. Second drafts of the various Regional plans of action were forwarded to the General Council. On the whole these were a decided improvement. This time no comment was made on them.

Phase 6. Instead the General Council used the second drafts to prepare for an Inter-Regional Meeting of the Society, which was held in Melbourne, Australia between 24th April and 10th May, 1991. The Inter-Regional Meeting was attended by all the members of the General Council plus all the Regional Directors and Mission Unit Coordinators. The purpose of the meeting was to provide some training in planning, discernment and leadership and to give an opportunity for the various local leaders to share their respective plans with their peers. Facilitators were employed to enable the most productive sharing and to train the Society's leadership in some of the skills of planning.

Evaluations at the end of the meeting were very positive. It was an important stage in our planning process because up till then the General Council had communicated with most Directors only by letter. Understandably most were confused about the task that faced them. Many were reluctant "planners" because up till then they had not been convinced of the need for or value of such long-term planning. This meeting provided them with more understanding of the process, plus the motivation and some of the skills they needed to assess and plan. At the end of the meeting it was decided that each Director, on returning to his Region, would work with his members to improve his plan in the light of what he had learned in Melbourne. It was also agreed that this third draft would be forwarded to the General Council by March 17th, 1992.

Phase 7. In April - May, 1992 the General Council reviewed the various third drafts and sent comments to the individual Directors along with a request for a final reworking of their plans to be completed by October 1st, 1992.

Briefly the whole process can be represented as follows:

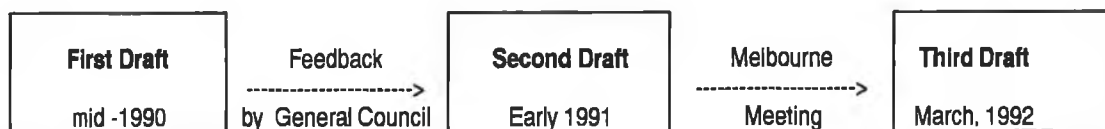


Figure 3.2

II. Methodology of this Thesis

To be consistent with this process a methodology was chosen that can best be described as a mixture of quantitative and qualitative approaches to research. [Burgess, 1985; Sherman & Webb, 1988; McGuigan, 1983; Argyris, 1983, Gummesson, 1991] .

a) Two major sources of evidence

The methodology concentrates on two major sources of evidence: i) an extensive file of documentation⁷, and ii) a questionnaire designed in the light of personal experience of the Columban process and an on-going analysis of the documentation.

Study of the various drafts presented by each Region over the past three years provides the first real evidence as to how effective strategic planning was in helping the Columbans prepare for the future. A glance at the first drafts reveals that very few understood the purpose of planning, but by the time of the third drafts it is clear that most Directors have come to appreciate the need to be more realistic about personnel resources, to identify growth areas, to make cutbacks and to plan in some detail.

A review of the documents tells a lot about the effectiveness of strategic planning, however to provide independent evidence and to confirm the results of the analyses of the documentation, a questionnaire was designed and sent to all the members of three Regions, Britain, Chile and Fiji and to a representative sample from a larger Region, Korea. The questionnaire was designed to assess whether there is any evidence in the membership's attitudes and circumstances to support the claims made for strategic planning.

The hope was that the results of the analyses of the documentation and of the questionnaire would be mutually informing.

⁷ There are three drafts of plans of action from each country along with official correspondence and *Guidelines* from the General Council.

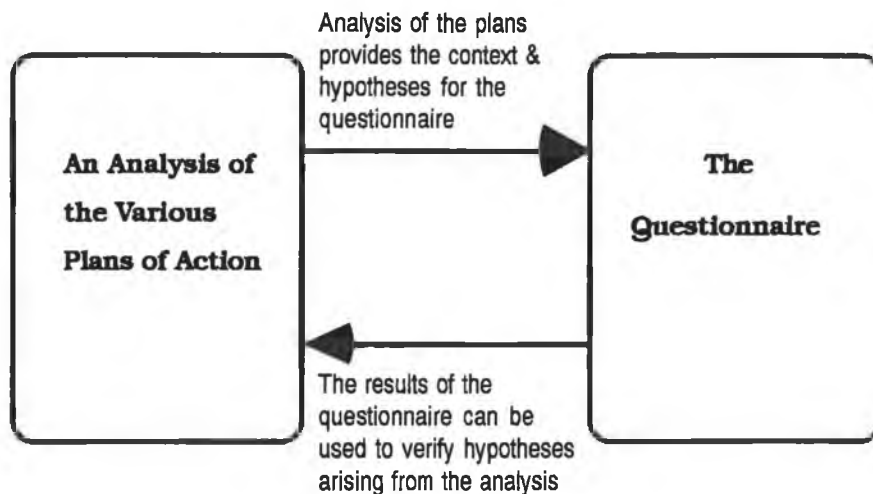


Figure 3.3

Analysis of the documentation sharpened the focus of the questionnaire and assisted in the analysis and interpretation of the survey data by validating survey results. On the other hand the results of the questionnaire can provide the objective evidence need to verify hypotheses arising from analysis of the documentation.

Both pieces of evidence are needed because the situations in the four countries are so different and their experiences of strategic planning so diverse, it would be impossible to interpret accurately the responses to the questionnaires without taking into account the different experiences of strategic planning. It would be too easy to misunderstand low or high results.

It is also hoped that a correlation between the survey data and the relevant plan of action will produce clearer proof of the value of certain elements of the planning process. The variety of experiences of strategic planning should allow for some profitable comparisons.

Finally, the survey represents the attitudes of the members at only one moment in a process of change that has lasted over four years and is still going on. To understand and interpret the results of the survey fully, it is important to see them in the context of the documentation and the history of the whole process. In some respects, strategic planning has only been a tool in the leadership's efforts to change

the Society into a more united, efficient, responsive and relevant missionary organization. Isolated emphasis on the results of the questionnaire could distort the understanding of the whole process.

b) The questionnaire

A questionnaire or attitude survey was used as the data collection method in this study because: i) they could be given to a large number of members at relatively low cost; ii) they could be self administered and would not require travel to any of the countries involved; iii) the responses could be quantified and would not be subject to the bias of the researcher and iv) as such they would provide objective evidence to check the claims made in the various plans and the hypotheses formed after examining them;

The questionnaire was sent on 20th March, 1992, on completion of the third phase of the formal strategic planning process. It was sent to all the members of the three smaller Regions, Britain [25], Chile [21], Fiji [22], and to a sample of 40 members from the larger Region of Korea. A total of 108 questionnaires were sent.

These four Regions were chosen for two reasons. Firstly, they provided a representative range of Columban missionary life, a traditional "home Region" in Europe, a small Region in South America, a small Pacific Region and finally a large and more established Region in Asia. This provides not only a wide geographical spread but a wide range of social, political situations and a representative sample of Columban apostolates. Secondly judging by the documentation they appeared to have had quite different levels of success with strategic planning. Having four groups whose success at strategic planning has been mixed also provided some possibilities of multi-group comparisons. [McGuigan, 1983].

This method should ensure a wide enough sample from which to generalise about the Society's efforts at strategic planning throughout the world. It would have been difficult to send the questionnaire to members in all the Regions and Mission Units of the Society because of the expense and also because the methodology of this study would also have demanded some correlation of the results of the questionnaire with the plans and other documentation provided by each Region/Mission Unit. There are sixteen Regions and Mission Units in the Society.

Since there are three drafts from almost all these countries the documentation is considerable in length, variety and complexity.

c) The design of the questionnaire

An Attitude Survey was constructed [c.f. Appendix 1]. This instrument was designed using segments borrowed from a number of Attitude Surveys produced by Professor John Hurley's group in Dublin City University's Business School. It and the cover letter were further refined in the light of Paul Erdos's, *Professional Mail Surveys*. [Erdos, 1970].

The following guidelines were used in designing the questionnaire:

- i] Since it is likely that a lengthy questionnaire would discourage careful and thoughtful response and, given the Columban culture, may even discourage any response at all, it was decided to concentrate on certain key topics relevant to the study. The questionnaire tries to verify whether our process of strategic planning has resulted in any concrete changes and/or has been effective in:
 - a] helping the Society gain a clearer and more unified sense of direction;
 - b] enabling the members to identify the missionary needs in their environment;
 - c] helping the Regions to be more realistic about their personnel resources;
 - d] enabling the various Regions to make the appropriate changes, expansion in some areas and cutbacks in others;
 - e] improving communication within the Regions;
 - f] improving morale, a sense of satisfaction and participation;
 - g] lengthening the time horizons of leaders and helping leaders and members to think more systematically about the future;
 - h] improving the Directors' and the General Council's leadership skills;
 - i] enabling the Society to become a more flexible, adaptable and self-correcting organization;
 - j] providing the Regions with plans/criteria against which to measure future decisions.

- ii] Effort was made to make the questions understandable to and meaningful for the majority of the respondents. [Erdos, 1970].
- iii] The replies would be anonymous and the only demographic question would be age.
- iv] However, the questionnaires would be coded prior to being sent out so that the Region of the respondent could be identified.
- v] Space would be provided at the end of the questionnaire and respondents asked for additional comments.
- vi] The questionnaire would be pre-tested to discover if respondents would have any difficulties in understanding the questions. As a result of this pilot study changes were made to the wording of a number of questions and to the cover letter.

d] Sampling procedure

On March 21st 1992, questionnaires were sent to the British [25], Chilean [21], and Fijian [22] Regional Directors who were asked to mail them to all their members enclosing a stamped addressed envelope addressed to the author here in Ireland. Each survey was accompanied by a personal letter explaining the purpose of the survey, the importance of their personal reply and informing them of the confidentiality of their replies and of the fact that there were no right or wrong answers but requesting their honest opinion. [c.f. Appendix 2] It would have been difficult to post the surveys directly to the membership because of the expense involved and also because all their addresses are not readily available here in Ireland.

The same procedure was followed in the case of Korea except that a random sample was selected. At the time of sending the questionnaire there were 75 members officially assigned to the Korean Region. However, 9 were not involved in the process of strategic planning, either because they were retired or because they were out of the Korea for the entire planning period. Another 12 were home on holidays when the questionnaire was mailed out. These men were scattered over three continents

and practically unreachable. That left 54 men resident in Korea and able to be surveyed. The sample was chosen by listing the men alphabetically and choosing every second one. This process was then repeated with the ones who remained producing the 40 to whom the questionnaire was sent.

A total of 88 surveys were returned. A response rate of 81.48%. Of these 21 were from Britain [84%], 17 were from Chile [80.95%], 19 from Fiji [86.36%] and 31 from Korea [77.5%].⁸

e] Data

To ensure the analysis of the data produced valid results:

- a] data from each survey was entered into a Lex Technical Word Processor;
- b] the data file was then printed and printouts were compared visually with the original source of the data by two other people as well as the author;
- c] more than 10% of the entries, taken at random, were checked by the author and a third person. They proved to be without error;
- d] data was transferred to SPSS-X where summary statistics were performed to ensure data validity;
- e] a range of tests were carried out for all questions.

f] Statistical analysis

The method of statistical analysis will be described in greater detail in Chapter 4. Briefly it consisted of a comparison of measures of central tendency and of spread for each of the four Regions and for the entire sample. Comparisons of frequencies, histograms and analyses of variance were used to identify significant differences.

⁸ The return from Korea is a little disappointing but understandable. There was some dissatisfaction with the strategic planning process [c.f. Chapters 4 & 5], so some may have been reluctant to reply. As well an Irish mail strike was called two weeks after the questionnaire was posted. More than half the replies were delivered at the end of the strike and it is possible that some were returned to sender because a number of Asian countries refused to accept mail for Ireland while the strike was on. Two replies did arrive from respondents who claimed to have reposted their replies after the strike finished.

CHAPTER 4 THE RESULTS

Introduction

This Chapter has two parts: Part I - A review of the documentation, of the various plans of action; and Part II - The results of the questionnaire. Deeper discussion and analysis of the results will be left to Chapter 5.

Part I A Review of the Documentation

The entire documentation for this section runs to more than a hundred pages. What is presented below is a brief summary, concentrating on the information necessary to evaluate the responses to the questionnaire.

Korea

The context for planning. Korea provided the most difficult context in which to plan. The situation is complex and changing rapidly. It is in Korea that missionaries feel most deeply the identity crisis referred to in Chapter 1. Korean society is changing at a pace rarely seen in the West and Christianity is growing at a similar rate. Around 1970 Christians made up only 1-2% of the population. They now make up around 25%. What was originally a poor Catholic Church, heavily dependent on foreign missionaries, is now a powerful, expanding middle class church controlled by local bishops and clergy. All the seminaries and novitiates are full and there have been record numbers of ordinations for years past. The Church is also becoming increasingly nationalistic. Most Columbans are by training and inclination parish priests and there are less and less openings for parish work these days. [The number of Columban parishes dropped from 40 to 34 in 1990 and it is expected that it will be down to 20 by 1995.] Some Columbans are searching for a new missionary role. Some now work in seminaries, in translation or inculturation, with alcoholics and gamblers, with farmers and workers, with the handicapped, in universities, in spiritual direction, counselling, hospital chaplaincies and so forth. Unfortunately there has been some polarisation between those involved in parish and those in special ministries.

The history of the planning process. Korea followed the same process as the majority of Regions. [c.f. Chapter 3]. Each Region presented three drafts over the space of three years. Each draft was commented upon by the General Council and returned for reworking.

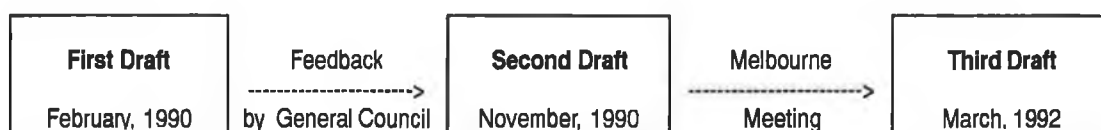


Figure 4.1

The Region prepared well for the Regional Assembly, February 1990, at which the **first Korean plan** was adopted. A very full questionnaire was circulated to the members, the results collated, published and discussed by the members in local area meetings. Five papers on crucial areas were commissioned, discussed and rewritten by the Regional leadership. These papers were then discussed by the Regional Assembly and to each Practical Implications and Recommendations were added. The result was a list of general directions with some practical recommendations rather than an assessment of their present apostolates and a plan of action for the future. The Assembly was marked by some polarisation so the atmosphere was not a very discerning one. There was no overall mission statement or criteria for evaluating apostolates and prioritising them.

The **second plan** did include an overall vision statement, *to make the Korean Church more missionary*. However, instead of concrete plans, the document outlines the challenges facing the Korean Columbans and presents a number of interesting possible apostolates or projects.

The **third plan** was not a plan but a progress report on the various possibilities proposed in previous 'plans'. A quarterly mission magazine had begun publication, three new men were appointed to mission education, two teams of six lay missionaries had been sent to the Philippines, the number of parishes was now down to 27. There was little or no progress on the other possible initiatives.

Fiji.

The context for planning. The significant factors influencing the planning process in Fiji were i] the ageing of many members of the Region⁹ and the growing indigenization of the local clergy¹⁰, and ii] the two Fijian coups in 1987. The coups

⁹ 10 of the 22 members are over sixty and have been in Fiji for around forty years.

¹⁰ The Archbishop and the majority of the local clergy are Fijian. The Fijian Church is fast approaching self-sufficiency in clergy.

were led by a Fijian Army officer, Colonel Rabuka. He and many Fijians were frightened they were losing control of their country to the local Indian population. The coups and the new Constitution have institutionalised a Fijian dominance over the political affairs of the country and to an extent marginalised the Indians. Fijian society is multicultural and multifaith. The 1986 Census showed that 52.9% of the population are Christian, 38.1% are Hindus and 7.8% are Moslems. Catholics make up only 9% of the population and only 1.2% of Indian-Fijians are Catholic. At present there is a great need for dialogue and national reconciliation between the various cultural and religious groups that make up Fiji. In general the atmosphere for planning was mixed. The missionary demands of the situation were clear but the age of the membership and the growth of the local church did not make planning easy.¹¹

The history of the planning process. They followed the same Columban process as the other Regions.

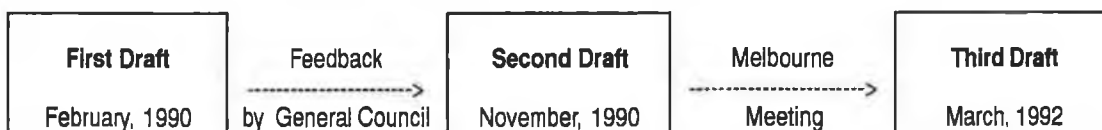


Figure 4.2

Their **first plan** was a report of a Regional planning meeting held in early February, 1990. They decided on 7 major goals which were summarised through the mission statement, *Walking with the Local Church in its efforts to be more missionary in the context of the need for National Reconciliation*. Unfortunately these goals remained more general directions than plans of action. There was no mention of concrete objectives, of the resources they would need, of the time frame for implementation or of evaluation. The Region refused to prioritise their apostolates for fear that "it would appear that some were doing 'more missionary' or 'more important' work than others".

By the time of their **second draft**, November 1990, the seven goals had been reduced to three: i) trans-cultural evangelization, ii) national reconciliation in the context of Ecumenism and cross-cultural communication, and iii) justice, peace and

¹¹ There was tension between the Fijian clergy and the Columbans after the coup as the Archbishop and the majority of local clergy were critical of the Columban protests.

ecology. The second draft was a progress report rather than a plan. It failed to list concrete objectives with timetables, etc.. The major development was the formation of two support groups, one for the men involved in Justice & Peace activities and one for the Hindi-speaking members of the Region. Both support groups had been active in their respective areas.

In March 1992 the acting Director sent the **third draft**, a Report on a Regional meeting of 3rd-6th February, 1992. It appears that there was a genuine spirit of discernment at the meeting. Three new support groups were formed: one for fostering vocations, one for promoting lay missionaries and the third for men working in parish ministries. The meeting decided on 9 criteria and each member was asked to prioritise or "colour code" or prioritize the existing apostolates of the Region. The results of the individual efforts at "colour coding" were collated and published in their report. However, they were never formally adopted by the meeting or the Regional leadership. Despite these shortcomings this attempt to "colour code" all the works of the Region was unique throughout the Society. The five support groups then broke up and came up with plans for each of their areas. These were of varying quality but at least some of them were concrete and planned in some detail. One shortcoming was that there were far too many objectives for the twenty two members of the Region to implement in any realistic way. The Hindi-speaking support group alone had eleven objectives. This was further evidence of the Region's reluctance to prioritise.

Chile.

The context for planning. The situation in Chile was favourable to planning. i) The country was just returning to democracy after 17 years under the dictatorship of Augusto Pinochet. Every organization in the country was planning for its new role in a democracy. ii) Because there was still a pressing need for priests, the Columbans in Chile were not experiencing the same crises about their identity and role as other missionaries throughout the world. [c.f. Chapter 1]. There was no pressure on them to look for work and considerable pressure to remain where they were. They have always had a close relationship with the local Church.

The history of the Chilean planning process. The process was largely the same for each of the Regions. The process can be represented as follows.

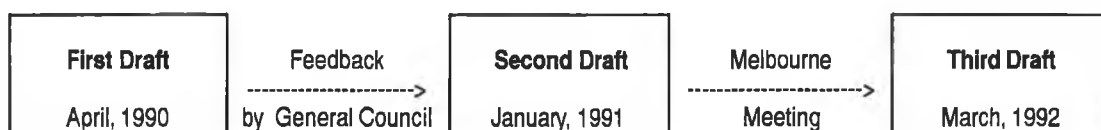


Figure 4.3

The **first Chilean Plan** of Action was the best plan submitted to the General Council on the first round. They identified five priorities for the next five years: i) to begin a missionary apostolate among the Mapuche Indians of southern Chile; ii) to take on a territorial commitment in a poor and neglected area of Santiago called "La Florida"; iii) to increase their commitment in the north of Chile to four men; iv) to invite all members of the Region to assess and submit ideas on how they could make their work more missionary¹²; and v) the Regional Administration was asked to draw up criteria for taking on new commitments and leaving existing ones.

There were other notable aspects of the meeting. a) The leadership prepared well for the meeting.¹³ b) There seemed to be a good spirit of participation in identifying the priorities. c) There was an "excellent discernment process".¹⁴ d) They were one of the few Regions to identify criteria for deciding priorities. e) There was a good deal of confidence shown in Regional Administration.¹⁵

By the time their **second plan** was submitted, January 1991, they had made progress on almost all their priorities. i) They took on a parish among the Mapuche Indians within a month of finishing their April Assembly. ii) They decided that as soon as they had personnel they would go to La Pintana instead of La Florida because it proved to be a more needy area. iii) They were unable to increase their numbers in the north. iv) The Director reported that as far as he could judge "there

¹² The word missionary is never defined but it seems to mean to reach out beyond the boundaries of the established church to peoples of other faiths, other cultures, and of the poorer social classes.

¹³ They investigated a number of possible new commitments and provided everyone with a thorough position paper, summarising the results of an internal questionnaire and their investigations and identifying the challenges facing the Region.

¹⁴ This seemed to make for greater openness, better morale and a greater spirit of unity and ownership of the resulting plan.

¹⁵ They were entrusted with the task of drawing up the criteria for taking on new commitments, with drawing up the plan and with putting into practice a couple of priorities which the Region recognised should not be part of the plan but on which they wanted some action.

is a greater missionary awareness developing in our present commitments". v] The Regional Administration completed the task of drawing up criteria and actually decided to withdraw from the more established parish of San Luis, Santiago. vi] They also decided to dedicate their regular twice yearly *Jornadas* or four day seminars to missionary themes arising out of their plan of action.

When they presented their **third plan** in March 1992 they had left the parish of San Luis and notified the Archdiocese of Santiago that they would be leaving the Parish of San Gabriel in early 1993. They had gone to new "parishes" in La Pintana and Valparaiso and moved to a new parish among the Mapuche, Puerta Saavedra. They had developed criteria for leaving and taking on commitments and had even decided on a sixth priority. The new priority was to promote missionary awareness in the Chilean Church. They believed "the time was ripe for Chile to become a dynamic and energetic sending church". They set up a working commission to find ways to promote more missionary awareness in the Chilean Church and to make mission education material available.

Britain.

The context for planning. The British Region is the newest Region in the Society. Up till April 1988 it was a District of the Irish Region and was dominated by Irish concerns. Since becoming a Region it has been characterised by pride in their new independence, a marked spirit of co-operation and a search for new apostolates that would mark it out as missionary in the British context. Traditionally Britain, along with Ireland, the United States and Australia/New Zealand have been regarded as "home regions". The principal role of "home regions" in the Society has been the support of missionaries overseas. They have not been encouraged to take on direct missionary work at home. This is now being questioned by some members in "home regions". Many British Columbans would like to become directly involved in missionary work in the multi-cultural and multi-faith Britain of today. So the context for planning in Britain was supportive and challenging, but not pressurised.

The history of the planning process. The British process was slightly different to the other Regions in that there was no second draft. The process can be represented as follows.

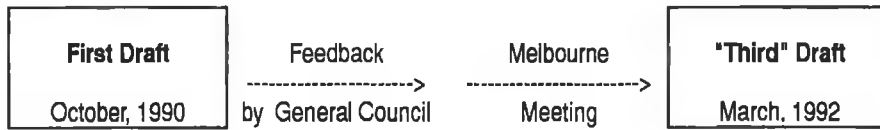


Figure 4.4

Britain was late in presenting its **first plan**. Their plan was not finalised until October 1990. Therefore they had the benefit of feedback from the General Council on the progress of strategic planning in the other Regions. Two of the major failings of other first plans were that they were more general directions for the future than concrete plans of action and the Regional leadership had not been decisive enough and had merely collated their members' replies. These were certainly not failings in Britain's first plan. Their major objective was quite concrete. They planned to establish a "missionary presence" among the marginalised in Newham Deanery, one of the poorest multicultural areas of London. A committee of three was proposed to search for a house and a timetable was established. As a corollary they proposed to the General Council that our present house in Hampstead be sold and a smaller property in Acton be bought to handle all the Columbans who pass through London. They also proposed to research the possibility of publishing a British edition of our mission magazine, *The Far East*. Finally, another committee was set up to plan for the on-going education for the membership.

They did not produce a second plan probably because it was too close to the Melbourne Inter-Regional/Mission Unit Meeting. On March 27, 1992 the British Director submitted their '**third plan**'. It was not a plan but a progress report on all their projects. The Newham community was established. The Region still believed that the sale of our Hampstead house was a worthwhile proposition. A committee was researching the possible publishing of a British edition of *The Far East*, and they had had three short seminars for the on-going education of their membership.

Part II The Results of the Questionnaire

The second source of evidence is the results of a questionnaire sent to 108 Columbans in the four Regions, Chile, Fiji, Britain and Korea. The assumption is

that analysis of the results of the questionnaire will provide objective and independent evidence to verify the claims made by the Regions in their plans, answer questions arising from an analysis of the plans and establish how effective the membership thought the process had been. While the results of the questionnaire would not be understandable without some knowledge of the various experiences of planning, the analysis of the documentation, Part I, would remain largely subjective without being verified by the results of the questionnaire, Part II .

Unfortunately the questionnaire had to be designed and distributed before all the third drafts of the plans were received and certainly before they could be properly analysed. To have waited any longer would have meant that the experience of planning would have become a distant memory for the respondents and the likelihood of receiving an adequate return would have diminished. The net effect is that there is not a perfect fit between the results of Part I and the design of the questionnaire but it is adequate.

a) A profile of the respondents

To understand the results of the survey it is important to know something about the respondents.

Of the 108 questionnaires distributed to the membership 88 or 81.48% were returned. Of these 17 were from Chile, 19 from Fiji, 21 from Britain and 31 from Korea.

Breakdown of participants by Region:

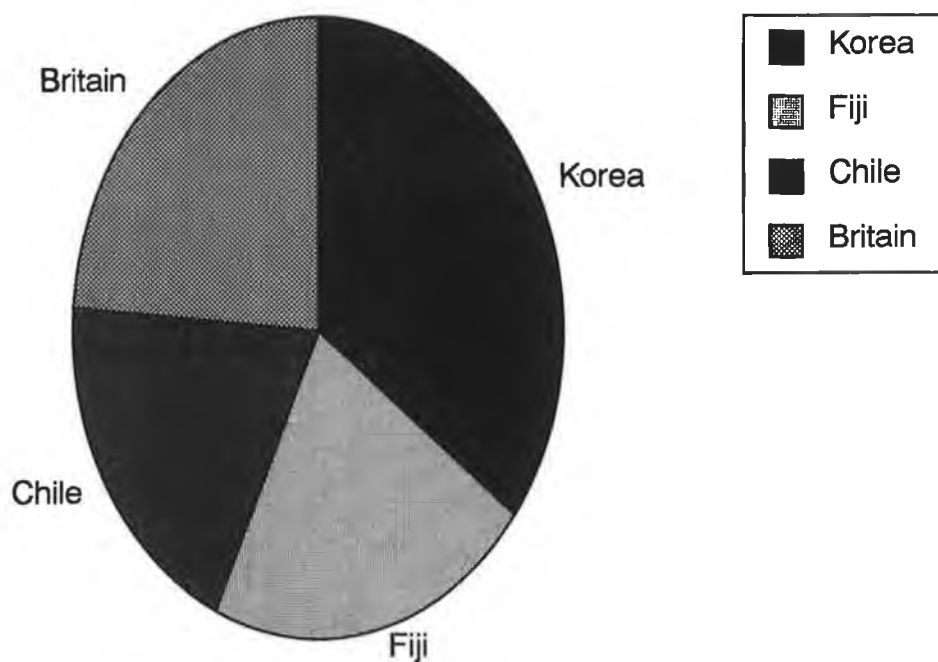


Figure 4.5

By age they breakdown as follows:

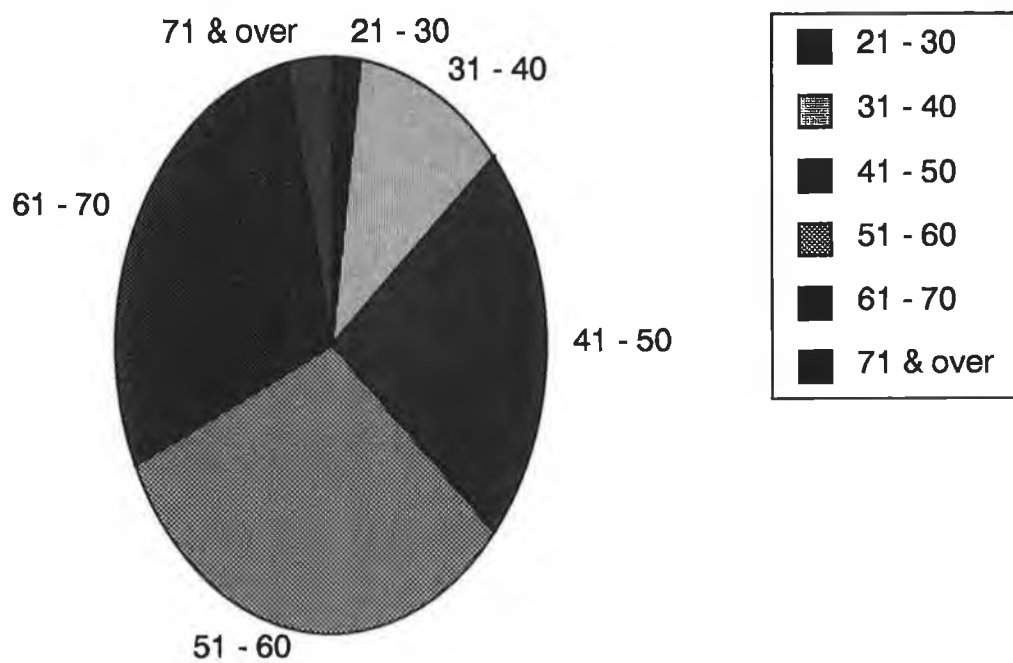


Figure 4.6

And by age and Region:

Age	Korea	Fiji	Chile	Britain
21 - 30	-	2	-	-
31 - 40	1	-	6	3
41 - 50	9	4	3	4
51 - 60	10	4	4	10
61 - 70	11	7	4	3
70 & over	-	2	-	1

Figure 4.7

This age distribution would be representative of the various Regions.

b) Statistical analysis

The statistical analysis will comprise a comparison of certain variables for the purpose of analysing any statistical differences existing in the data. For the purposes of this study, measures of central tendency and spread were used as the basis of comparison. Means were compared by Region and frequencies and histograms - overall and per Region - were analysed. Suspicions about negative elements were then tested by isolating the relevant Region and comparing frequencies and histograms for all Regions, then for all excluding the Region under suspicion and finally for each Region. This was then verified through a number of analyses of variance. Only if the Sig. of F. was less than 0.05 was it interpreted as indicating a statistically significant difference. In some cases the means for different questions were pooled together to form a single concept before analyses of frequencies, histograms and analyses of variance. In all cases of pooling means from different questions Pearson's correlation coefficient was used to determine whether the various means could be legitimately associated or correlated.

The following section shows both the question and answer patterns using an adapted and abbreviated form of the questionnaire. The complete questionnaire can be found in Appendix 1.

To avoid "response set" the meaning of some values in the questionnaire was reversed. All mean values have been adjusted so that a value of 1 = Negative, i.e. it

disagrees with the statement while a value of 5 = Positive, i.e., it agrees with the statement. There are also a number of Yes/No questions and there was ample room for comments at crucial stages throughout the questionnaire. These comments were used to uncover differences or further information not accessible to a Yes/No or multiple value questions.

Various questions contained either 5 or 4 point scales. The type of scale being used is indicated at the beginning of each section.

Although the reply rate was over 81%, the total numbers are not great so the margin of error will be considerable. This will severely limit the certainty with which conclusions can be drawn.

c) Report of results

i) The results are presented according to the major sections as outlined in the Questionnaire. [c.f. Appendix 1].

ii) A mean value and a standard deviation value are given for the entire sample.

iii) The only comparison is by Region. Because the planning was done on a Regional basis, Regional comparison will provide the best gauge of how effective each planning process was. It is hoped that it will also show the value of certain planning components done well in one Region and badly or not at all in another.

Thought was given to a comparison by age but rejected because the various experiences of strategic planning were so diverse one would not be comparing like to like and the results would be seriously skewed. For example, in the 41-50 age group, 9 of the 20 respondents are from Korea where the experience of planning was arguably worse than in other Regions. A finding that the 41-50 year olds were negative about strategic planning would be seriously skewed by the Korean experience. Consideration was given to an intra-Regional comparison by age, namely under 50 and over 50. The value of such a comparison was doubtful because the very small samples involved. An initial investigation through SPSS-X confirmed this.

While designing the questionnaire thought was also given to trying to isolate the men in positions of authority so as to be able to compare their opinions to the rest of the sample. This approach was also abandoned because it was impossible to do it anonymously. Without anonymity too much pressure would be put on the leaders in replying, if they did so at all. They would also need a different and longer questionnaire.

"*" after a mean value identifies a significant statistical difference between the relevant sample and the others.

The Assessment and Planning Process has helped:

[5 point scale] Strongly disagree ---> Strongly agree.

	Korea		Fiji		Chile		Britain		Society	
	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.
Q.1 Clearer Direction ¹⁶	3.23*	.8450	4.05	.5243	3.94	.7475	3.90	.8891	3.70	.8463
Q.2 Unified Direction	2.84*	.9694	3.79	.6306	3.88	.8575	3.95	.8646	3.51	.9825
Q.3 Identify Needs	2.81*	.7924	3.74	.4524	4.00	.6124	3.81	1.078	3.48	.9220
Q.4 Thorough assessment	2.81*	1.046	3.47	.6118	3.59	.7123	3.62	.9207	3.30	.9366
Q.5 Realistic re personnel	3.45	.9252	3.95	.7050	3.65	.9963	3.81	.9284	3.68	.9040
Q.6 Made Cutbacks	2.77	1.023	2.79	.6306	3.24	.9034	3.00	.8944	2.92	.8993
Q.7 Identified Growth	2.52*	.9957	3.37	.6840	3.53	.6243	3.52	.8729	3.14	.9491
Q.8 Prepared for Future	2.84*	1.003	3.79	.5353	3.76	.7524	3.60	.8826	3.40	.9334

Figure 4.8

¹⁶ The process for identifying the significant statistical difference of the Korean sample was as follows: i] all the data was pooled as one and frequencies and histogram analysis done; ii] this lead the author to suspect that there was a negative element among the four samples; iii] each country's frequency tables and histogram where then examined; iv] when Korea was suspected as the differing sample it was isolated and analysis of histograms and frequency tables for all Regions and all Regions excluding Korea confirmed the author's suspicion; v] this was then confirmed by analysis of variance for all Regions, the Sig. of F. was .001 clarifying that there was a significant difference between the Regions and their answering factors; vi] Korea was then isolated and the author did an analysis of variance for the 3 remaining Regions; vii] the Sig. of F. for the remaining three was .811 denoting no significant difference between the three of them and showing that Korea is the contributing factor to the difference between the Regions. This result was doubled checked through comparing similar samples through a Crosstabs/Chi Square analysis. A similar methodology was followed every time an initial analysis of frequencies and histograms lead the author to suspect that a significant difference existed.

Main Findings

- i) The Society mean values and the Fijian, Chilean and British mean values for Qs. 1-5 & 7-8 are positive, i.e., >3.0, indicating a positive overall evaluation of the effects of the planning process.
- ii) The Korean evaluation is significantly lower for all questions with the exception of Qs. 5 & 6 and with the exception of Q. 1 & Q.5 actually negative.
- iii) On Q.6 all Regions are far less positive than for the other questions. In fact, the Society mean value and the mean values for Korea and Fiji are actually negative. This is interesting because Q.6 is the most concrete and verifiable question of the 8 questions in this section.

Regional Plan of Action

Q.9 Is your Region governed by plans? [5 point scale] Not at All - Very Much.

Korea		Fiji		Chile		Britain		Society	
Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.
2.74* ¹⁷	.7732	3.00*	.8819	4.00	.9354	3.71	1.0556	3.27	1.0253

Figure 4.9

Q.10 Region have a clear plan of action? Yes or No.

	Korea	Fiji	Chile	Britain
Yes	12	14	12	19
No	19	5	5	2

Figure 4.10

If yes, please answer 11] and 12].

Q. 11. Major objectives of Regional plan are clear? [5 point scale] Very clear - Very unclear.

Korea		Fiji		Chile		Britain		Society	
Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.
3.07*	.8287	3.86	.8644	3.94	.5737	3.74	.8057	3.67	.8231

Figure 4.11

¹⁷ A statistical analysis similar to that outlined in footnote 8 above, revealed that both Korea and Fiji were like samples and Chile and Britain were also like samples.

Q.12 Regional plan is correct? [5 point scale] Strongly disagree - strongly agree.

Korea		Fiji		Chile		Britain		Society	
Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.	Mean	St. Dev.
3.69	.7511	4.21	.4258	4.25	.5774	4.05	1.177	4.06	.8272

Figure 4.12

Main Findings:

- i) Only Chile and Britain are clearly positive that the activities of their Region are governed by plans, Q.9. Both Korea and Fiji are significantly lower and Korea is actually negative.
- ii) The most significant finding of this section is that a clear majority of members in Korea do not believe that their Region has a clear plan of action for the future, Q.10.
- iii) The Fijian members are more positive than Korea but there is a significant minority who do not believe the Region has a clear plan for the future, Q.10.

The Process of Planning

[5 point scale] Strongly agree - strongly disagree.

	Korea		Fiji		Chile		Britain		Society	
	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.
Q.13 Understand the process	3.32	.7911	3.74	.7335	3.82	.8823	3.86	.7270	3.64	.8049
Q.14 Members were involved	3.00*	1.00	3.84	.5015	4.18	.8090	3.86	.7270	3.61	.9276
Q.15 General Council's Guidelines clear	3.58	.8072	3.74	.8719	4.12	.4851	3.90	.4364	3.80	.7137
Q.16 Region gave leadership	3.23*	.9560	3.95	.7050	4.24	.6642	3.95	.7400	3.75	.8873
Q17 Helped by Discernment	2.65*	.9504	3.58	.7685	3.94	.8269	3.71	1.146	3.35	1.072

Figure 4.13

Main Findings:

- i) With the exception of the mean value for the Korean reply to Q.17, all the mean values are positive, indicating a positive response to the questions regarding the Process.
- ii) The Korean response is again significantly lower on Qs. 14, 16 & 17, and in the case of Q.17 actually negative.
- iii) On the other hand, the Chilean Region is generally more positive than the other Regions in their responses to the questions in this section.

Concrete Results

Q.18 Any concrete changes

	Korea	Fiji	Chile	Britain
Yes	13	12	16	16
No	16	7	1	3

Figure 4.14

Under Q.18 space was given to identify the changes. Of the 13 Koreans who had said there had been changes 11 named some. 9 mentioned men appointed to vocations or mission education and 4 the cutback in the number of parishes. All 12 Fijian Columbans who had answered yes to Q.18 named changes. 8 mentioned the new support groups and their priorities and 6 specifically mentioned the new plans for lay missionaries. 15 of the 16 Chileans acknowledged changes. 10 of these mentioned giving up parishes and 13 taking on new commitments. All 16 British Columbans who had said yes to Q.18 identified changes. 13 of these mentioned taking on the new apostolate in Newham, East London.

Main Findings:

- i) The majority of Koreans who responded, 16 out of 29, did not believe there have been any concrete changes introduced because of the assessment and planning process.
- ii) One third of the Fijians who responded, 7 out of 19, also did not believe the planning process had produced changes.

- iii) It may be significant that the two Regions who were clearly positive in their response to Q.18 and were nearly unanimous in naming the changes were Chile and Britain where concrete new commitments had been taken on.

Communication

[5 point scale] Very Bad - Very Good.

	Korea		Fiji		Chile		Britain		Society	
	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.
Q.19 Between Members ¹⁸	2.87*	.9571	3.50	.7071	4.06*	.7475	3.62	.5896	3.41	.8964
Q.20 With Regional Superiors	3.42	.8860	3.61	.7775	4.29*	.7717	3.71	.5606	3.70	.8229
Q.21 With General Council	2.77*	.8835	3.44	.7048	3.94	.6587	3.57	.6761	3.33	.8716
Q.22 With local Church ¹⁹	2.65*	.7549	3.22	.9423	4.12*	.6966	3.55	.5104	3.27	.9130

Figure 4.15

Communication [cont.] [5 point scale] Strongly Disagree - Strongly Agree

	Korea		Fiji		Chile		Britain		Society	
	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.
Q.23 Bad communication - decreased effectiveness	2.81* 20	.9458	3.00	.8660	3.59	1.064	3.43	1.076	3.15	1.024
Q.24 Planning has improved communication	2.94*	.9639	3.78	.8782	3.88	.6002	3.62	.9735	3.46	.9621
Q.25 Planning - better understanding of others' work	2.87*	.9217	3.78	.7321	3.94	.9663	4.05	.5896	3.55	.9616

Figure 4.16

¹⁸ A statistical analysis similar to that outlined in footnote 8 above, revealed that Fiji and Britain were like samples and that Korea was significantly lower and Chile significantly lower.

¹⁹ A statistical analysis similar to that outlined in footnote 8 above, revealed that Fiji and Britain were like samples and that Korea was significantly lower and Chile significantly lower.

²⁰ These figures have been reversed to make them consistent with the other results where the higher mean value represents a more positive evaluation.

Main Findings

- i) The mean values for all the Regions, with the exception of Korea, are positive indicating an overall positive response in the area of communication for Fiji, Chile and Britain.
- ii) The mean values for the Korean Region are significantly lower and with the exception of Q.20 actually negative indicating dissatisfaction with the level of communication in the Region and with the General Council and local church.
- iii) Chile seems to be the only Region that clearly disagrees with the statement that inadequate communication has decreased the overall effectiveness of the Society [Q.23].
- iv) With the exception of Korea, all agree that the planning process has given them a better understanding of the work of other members in the Region.
- v) The mean values for the Chilean Region are high and in the case of Qs. 19, 20 & 22 significantly higher than the other Regions. One result that is especially noteworthy is their response to Q.22 [Communication with the local church]. The contrast with the other Regions and especially Korea is remarkable.

Participation

[5 point scale] Strongly disagree - strongly agree

	Korea		Fiji		Chile		Britain		Society	
	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.
Q.26 Members are heard	3.40	.9322	3.74	.8057	4.06	.7475	3.76	.7003	3.69	.8396
Q.27 Structures for participation	3.27*	1.081	3.79	.6306	3.94	.8993	3.95	.7400	3.68	.9213
Q.28 Planning improved participation	2.97*	.8899	3.84	.6021	3.76	1.033	3.81	.8729	3.52	.9384

Figure 4.17

Main Findings:

- i) The overall response is positive, indicating that members feel they are heard and that there are adequate structures for participation in their Region. However, Korea is significantly lower than the other Regions on Qs. 27 & 28.
- ii) With the exception of Korea, all the Regions agree that the planning process has helped improve participation in decision making in their Region, Q.28.

Purpose

Q.29 Society achieve founding purpose? [5 point scale] Not at all - very much.

Korea		Fiji		Chile		Britain		Society	
Mean	St. Dv.	Mean	St. Dv.	Mean	St. Dv.	Mean	St. Dv.	Mean	St. Dv.
3.55*	.8500	4.00	.7454	4.24	.5623	4.24	.9952	3.94	.8625

Figure 4.18

Q.30 Do you feel the Society in your Region has a clear unified sense of purpose? Yes or No.

	Korea	Fiji	Chile	Britain
Yes	5	13	12	17
No	24	6	5	3

Figure 4.19

Under Q.30 room was also given for any comments. The 13 Chilean comments were mostly positive about their sense of clear unified purpose even the 2 of the 3 who had said No made comments like, "there are efforts being made", "we have a clearer, more unified sense of purpose. However, we have not made the tough personnel decisions". Most felt they were growing in unity through the assessments.

The Fijian Columbans were more hesitant but felt that "since the assessment the direction has become clearer". Some felt it was still somewhat "notional". And those who were negative highlighted age, differing theologies and attitudes to parish as possible sources of division.

Eight out of the ten British comments were positive but four mentioned doubts about whether all the personnel were totally behind the new direction or able to implement it.

There were 15 comments from Korean members and 13 of those were from the 24 who had said No. Their comments can be summed up by the following: "a parish versus non-parish split is obvious", "By Society I presume is meant all the members - not just administration. I think most try to have the apostolate that suits themselves and by and large get it.", "No trying to accommodate everyone!!", "Because of polarization between liberal and conservative values and approaches we lack a unified sense of purpose - but a dual purpose is being achieved".

Q.31 Planning process helped in any way? Yes or No.

	Korea	Fiji	Chile	Britain
Yes	22	18	17	19
No	6	1	-	2

Figure 4.20

Respondents were also asked for comments. All of the 10 Chilean comments were positive but all mentioned different ways in which the process had helped. From Fiji there were 10 positive comments and the major emphases were that it had got them talking to one another and forced them to prioritize so as to make the best use of their resources. All 15 British comments were positive and the most frequently mentioned item was that it had helped them realise what others were doing. 13 of the 16 Korean comments were positive and the common thread was that while there was still a lot of division and resistance the process had raised issues they needed to face.

Main Findings:

- i) Only Britain seems to be clearly positive about Q. 30. In both Fiji and Chile almost one third of the respondents answered No. In Korea 24 of the 29 who answered do not believe that the Society in Korea has a clear unified sense of purpose. In their written comments the Korean Columbans make reference to polarization and members "doing their own thing". It is interesting that the Korean results for Q.30 are more negative than for the similar Q.10.. It

may be that it is the addition of the word "unified" to Q.30 that has made all the difference.

- ii] Yet all Regions including Korea [22 out of 28 respondents] believe that the planning process has helped. Q.31. In their comments under Q.31 respondents claim that the process has at least helped the members to talk more to one another and to "face the issues they need to face".
- iii] All the Regional mean values to Q.29 are greater than 3.5 and clearly positive. Korea is positive but significantly lower than the other Regions.

Current Mission of the Society

Q. 32 Current mission statements meaningful?

	Korea	Fiji	Chile	Britain	Total
Very meaningful for you	6	6	12	11	35
Fairly meaningful	12	10	5	9	36
Only a little meaningful	11	2	-	1	14
Not at all meaningful	-	-	-	-	-

Figure 4.21

Q.33 "How would you express the mission of the Society today?" Comment.

Among those for whom the Society's current mission statements are "only a little meaningful" 2 made rather cynical comments about "doing your own thing", 2 believed that we need to be more subservient to the local church and 5 made statements largely in line with the Constitutions and current documents of the Society. 59 of those who answered "very meaningful" or "fairly meaningful" gave comments which were also in line with the current mission statements of the Society. They emphasise proclaiming Jesus's Kingdom and values to the whole of creation but especially the poor, marginalised and those of other cultures and faiths. They also emphasise the need for dialogue with other religions and efforts always to make the local church more missionary. There was no serious disagreement among the answers or with the Society's official mission statements.

Q.34 Your apostolate fulfil the Society's current mission? Yes or No.

	Korea	Fiji	Chile	Britain
Yes	27	17	16	18
No	2	1	1	3

Figure 4.22

Q.34 Comments.

Of those who answered No and also gave a comment the common theme is "No, because I am working in an established parish or in fund-raising and not reaching out to the more missionary tasks". 12 of those who answered Yes would also feel that tension but would believe they were missionary enough to answer Yes.

Main Findings:

- i) There does not seem to be any serious alienation from the Society and its current mission statements in Fiji, Chile and Britain. In fact, they seem to be very positive about the current mission statements of the Society. Almost all their members claim that the current mission statements are at least fairly meaningful for them Q.32, they express this mission in terms akin to the official Society statements, Q.33, and they agree that their apostolates fulfil the Society's current mission, Q.34.
- ii) The picture is not so clear in the case of Korea. 11 of the 29 who responded to Q.32 found the current mission statements "only a little meaningful" and yet they were able to express the Society's mission in terms akin to the official statements, Q.33, and 27 out of 29 believed their apostolate fulfilled the Society's current mission statements.

Satisfaction

Q.36 [5 point scale] I strongly disagree - I strongly agree with the statement, I would rather be a Columban.

Korea		Fiji		Chile		Britain		Society	
Mean	St. Dv.	Mean	St. Dv.	Mean	St. Dv.	Mean	St. Dv.	Mean	St. Dv.
4.50	.5724	4.32	.9459	4.59	.6183	4.86	.3586	4.56	.6595

Figure 4.23

Q.37 If a young man came to you with a genuine interest in a missionary vocation would you

	Korea	Fiji	Chile	Britain	Total
Discourage him from the whole idea	-	1	-	-	1
Encourage him to join the Society	27	17	15	18	77
Encourage him to join another missionary society	-	-	-	-	-
Encourage him to become a lay missionary	1	-	2	3	6

Figure 4.24

Q.37 Comments.

The comments are mostly positive but 11 of the 77 who would encourage the young man to join the Society mentioned, even if obliquely, some reservations. They were concerned with difficulties arising out of the lack young men in the Society, the length of formation and fears for the future.

Satisfaction in daily missionary work. [5 point scale] Strongly disagree - strongly agree.

	Korea		Fiji		Chile		Britain		Society	
	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.
Q.38 Fulfilled in work	4.30	.5960	4.32	.4776	4.29	.4697	4.33	.8563	4.31	.6157
Q.39 My work is important	4.07	.9072	4.21	.5353	4.06	.6587	4.38	.8646	4.17	.7807
Q.40 My work is effective	4.37	.5561	4.11	.3153	4.35	.4926	4.33	.8563	4.30	.5929
Q.41 My skills are adequate	3.33	.9589	3.58	.6070	3.47	.7998	3.81	1.030	3.53	.8871

Figure 4.25

Main Findings:

- i) The Regional mean values for this section are more positive than for any other indicating a clear satisfaction with the Society. There is also no

significant difference between the Regions indicating that this opinion is shared by all Regions.

- ii) In the case of Q.36 the Society mean value is as high as 4.56 indicating that individual members are positive about their own vocation.
- iii) Q.37 [Encourage a young man to join the Society]. Only 1 man would discourage him from the whole idea.²¹ 77 out of the 84 who replied to this question would encourage the young man to join the Society.
- iv) As to satisfaction in their daily work as missionaries, Qs. 38-41, the mean values for all the Regions are positive. Only on Q.41 do they dip below 4.

Interestingly the Korean mean value for Q.40 is the highest of all the Regions.

Leadership

[5 point scale] Strongly disagree - strongly agree.

Leaders:

	Korea		Fiji		Chile		Britain		Society	
	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.
Q.42 Provide clear sense of direction	3.27*	1.015	3.83	.6183	3.76	.6642	4.00	.8944	3.66	.8893
Q.43 Plan well	2.83*	.8743	3.72	.5745	3.71	.5879	3.76	.8891	3.42	.8740
Q.44 Listen well	3.13*	.9732	3.94	.5557	3.82	.6359	3.86	1.108	3.61	.9398
Q.45 Promote trust	3.40*	.8944	4.00	.6860	4.06	.7719	4.05	.8047	3.81	.8521
Q.46 Decide promptly	3.13*	.7761	3.44	.7838	3.35	.7859	3.76	.7684	3.40	.8012
Q.47 Implement decisions	3.03*	1.033	3.61	.6978	3.47	.7998	3.76	.7003	3.42	.8874

Figure 4.26

21 Even he did not say this so clearly but it was the interpretation the author drew from the comments he made.

Main Findings:

- i) The mean values for all Regions, with one exception, are positive to each question in this section, indicating an overall positive opinion of leadership in the Society. The one exception is the Korean mean value for Q.43, indicating that the Korean members have questions about their leaders' ability to plan.
- ii) The Korean mean values are significantly less positive on all questions.

Change, Innovation and Flexibility

[5 point scale] Strongly disagree - strongly agree.

	Korea		Fiji		Chile		Britain		Society	
	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.	Mean	St.Dv.
Q.48 Society encourages ideas	3.47	1.075	3.79	.5353	4.12	.9275	3.90	.6407	3.77	.8768
Q.49 Society life-style will continue	3.50	.7311	3.42	.6925	3.47	.6925	3.57	.7998	3.49	.7132
Q.50 Society work continue	3.44	.7279	3.21	.8550	3.65	.7859	3.52	.8729	3.45	.8035
Q.51 Well disposed to changes	3.84	.6375	3.84	.6882	4.18	.5286	4.10	.8309	3.97	.6856
Q.52 Society has changed too much ²²	3.52*	1.03	4.00	.8819	4.18	.6359	4.21	.9763	3.91	.9534

Figure 4.28

Main Findings:

- i) The mean values for Q.48 are all positive indicating a good atmosphere within the Society regarding change.
- ii) The mean values for Q.51 are also positive indicating members believe they believe that they personally are open to change
- iii) None of the Regions believe that the Society has changed too much, Q.52.
- iv) Yet the mean values for Qs. 49 and 50 are also high. It is difficult to make sense of these results. Since mission is in a state of crisis and the planning

²² Because of the double negative in the question these figures have been reversed.

process was an official Society attempt to redefine its role and contribution, it is difficult to see how so many could believe that the Society's life-style and work will continue in its present form for the foreseeable future. It is possible that individual members could believe that although they recognise change is necessary they personally hope to avoid it. However, the questions relate not to individual's but to the Society's present work and life style. Interestingly these questions were grouped together and analysed with Pearson's Correlation Coefficients Test. They did not correlate. These questions seem to have been poorly designed so the results are inconclusive.

Comments on the Survey

Although 51 members made comments in the space provided at the end of survey there were few common themes. The most common comment was to congratulate the author on taking this initiative and wish him all the best [7]. 6 people also expressed pride in the Society. Other than that there was no theme that attracted more than 3 similar comments.

CHAPTER 5 DISCUSSION

Introduction

This chapter will have two sections. The first section will be discussion and evaluation of the results of the questionnaire and a comparison of the four Regional processes to learn if any process has been better than the others and possibly isolate aspects of a planning process that were crucial to their success. The second section will evaluate how the findings of this study relate to the various theories of strategic planning presented in Chapter 2 and hopefully develop some new theoretical conclusions.

I. A Discussion and Evaluation of the Results

a] The most significant findings from the questionnaire

- i] The most significant finding is that strategic planning was successful in three Regions. Fiji, Chile and Britain are all positive in their evaluation of their planning processes.²³

Majorities in Fiji, Chile and Britain agree they have a clear plan for the future [Fig. 4.10] and a clear and unified sense of purpose [Fig. 4.19]. They are also positive regarding the degree to which their Region is governed by plans [Fig. 4.9] although Fiji, like Korea, is significantly less positive than the other Regions.²⁴

- ii] Strategic planning appears to have helped all the Regions, with the exception of Korea, in most of the particular areas the experts claimed it would.

- a] helping the Society gain a clearer and more unified sense of direction [Andrews, 1980; Ansoff, 1965; Steiner, 1979; Lorange, 1980; MacMillan, 1986; Thomas, 1988; Coghlan, 1987; Langley [1988];

Members in Fiji, Chile and Britain believe that they have a clear and unified plan for the future. [c.f. Figs. 4.8, 4.9, 4.10, 4.19].

²³ Their only negative result in the whole questionnaire is for Fiji on the question of making cutbacks [Q.6, Fig. 4.8]. This is understandable as they did not decide on any cutbacks despite committing themselves to many new objectives.

²⁴ Their "plans" were all reports of meetings rather than plans formally adopted by the leadership.

- b] enabling the members to identify the missionary needs and opportunities in the environment [Andrews, 1980; Ansoff, 1965; Steiner, 1979]; Lorange, 1980; MacMillan, 1986; Thomas, 1988; Coghlan, 1987];

All the Regions, with the exception of Korea, believe that strategic planning has helped them identify needs and make a thorough assessment [Fig. 4.8].²⁵

- c] helping the Regions to become more realistic about their personnel resources [Steiner, 1979; Thomas, 1988; Lorange, 1980; Coghlan, 1987];

All the Regions agree that strategic planning has helped them become more realistic about their personnel resources [Fig. 4.8]. However, given the personnel projections [Korea and Britain can expect a 35% drop and Chile and Fiji a 20% drop in the next seven years] it is difficult to believe that any Region is being realistic about personnel when it does not consider serious cutbacks. None of the Regions has begun to think in terms of cutbacks of this magnitude as yet.

- d] enabling the various Regions to make the appropriate changes, expansion in some areas and cutbacks in others;

The responses from Fiji, Chile and Britain to Qs. 7 [Identified growth] are positive but all three Regions are not as sure about Q.6 [Made cutbacks] and Fiji is actually negative [Fig. 4.8]. An analysis of the various Regional plans supports this finding. Only Chile made cutbacks. Neither Fiji or Britain decided on cutbacks and Fiji actually resisted the idea of prioritising in the first round of planning. Failure to face up to the limits of their personnel resources is a common tendency in religious congregations and it will take time for strategic planning to be effective in this area.

- e] improving communication within the Regions [Steiner, 1979; Thomas, 1988; Quinn, 1980; Langley, 1988];

Again with the exception of Korea, members are positive about communication and agree that the planning process has improved

25 There was some evidence especially in the first drafts that although they had all collected an enormous amount of information they were not as successful in analysing it and building on it when planning. It is possible that they need a better system for analysing their environment.

communication and understanding in their Regions [Figs. 4.15 & 4.16].

- f] improving morale, a sense of satisfaction and participation [Langley, 1988]:

All Regions are positive about the degree of participation in their Regions and all, with the exception of Korea, agree that the planning process has improved participation in their Region [Fig. 4.17].

With regard to morale, most members agree the Society is achieving the purpose for which it was founded [Fig. 4.18].²⁶ They are also positive about the Society's current mission statements although it is disturbing to find that 11 out of the 29 Koreans who responded to Q.32 found the current statements "only a little meaningful" [Fig. 4.21].

The results for the section designed to assess the members' sense of satisfaction [c.f. Figs. 4.23, 4.24, & 4.25] are more positive than any other section of the questionnaire. Members in all four Regions seem to be well satisfied with their daily work. They get a sense of fulfilment from their work and feel that it is an important and an effective way of proclaiming the Gospel. They are also reasonably confident that their own professional skills are adequate [Fig. 4.25]. The results concerning satisfaction are among the most enigmatic of the questionnaire.²⁷ It might have been better if the questionnaire had also included questions about how members felt about their future.

²⁶ Again Korea is significantly less positive than the others.

²⁷ They are so positive they do not seem to represent the real questioning going on in the mission world today [Chapter 1], the decline in numbers and vocations for the Society, the struggle the various Regions had to assess, prioritize and plan. As well they are not consistent with the author's broader experience of administration within the Society. It is especially strange that Korea is almost as positive as the others in this section and yet so negative on most other questions. It is possible that members in all Regions are positive because they feel the Society is moving in the right direction. It could be evidence of some complacency, or it might be an instance of rationalisation. The results seem in consistent and there is not enough information on which to make an informed judgement. It is a matter which needs further research.

There is no concrete evidence that strategic planning helped increase their morale or sense of satisfaction. The suspicion is that morale was improved by planning, the members do believe it helped create a clearer and more unified sense of direction, improved communication and participation and led to better understanding of others' work.

- g) lengthen the time horizon of the leaders [Quinn, 1980] force them to look ahead [Steiner, 1979; Quinn, 1980] and help them and the members to think more systematically about the future;

The Fijian, Chilean and British members agree that strategic planning prepared them for the future [Fig. 4.8] and that their leaders plan well [Fig. 4.26]. The analysis of the documentation shows that strategic planning did force the leaders and members of all Regions to look ahead in a way they had never done before.

- h) improving the leader's leadership skills [Steiner, 1979; Lorange, 1980; Thomas, 1988; Quinn, 1980; Langley, 1988]:

The responses to Qs. 16, 20 and 42 - 47 [Figs. 4.13, 4.15 & 4.26] are positive indicating a good opinion of their leaders and of the leadership they gave to the process.²⁸ Although there was no question as to whether strategic planning had helped improve the quality of leadership, the documentation presented to the General Council shows that the Regional Directors were learning to take a more assertive leadership role.

- i) enabling the Society to become a more flexible, adaptable and self-correcting organization [Steiner, 1979; Quinn, 1980; Coghlan, 1987; Mintzberg, 1987];

The evidence from the questionnaire [c.f. Fig. 4.27] is confusing, so little can be proved regarding this goal of strategic planning. The real test of flexibility and adaptability will only come in later years. At present the only concrete evidence that strategic planning did help a Region become a more flexible and self-correcting organization is from

28 The only negative mean value was for Korea with regard to their leaders' ability to plan well [Fig 4.26].

Chile where the members having implemented a couple of their priorities, reassessed their situation and decided on an additional priority.

- j] providing the Regions with plans/criteria against which to measure future decisions [Steiner, 1979; Quinn, 1980] ;

Chile is the only Region which can be said to have criteria and a concrete plan for the Region against which to measure future decisions. All the other Regions are still at a much earlier stage of planning and have not yet decided on criteria, assessed and prioritised their apostolates, etc.. To that extent the various planning processes have failed to achieve this goal as yet. This could be a "mixed blessing". It is important that Regions develop criteria to guide them in their decisions but given the emphasis of more recent authors such as Quinn [1980], Coghlan [1987] and Mintzberg [1987] on the need for flexibility it may be an advantage not to be too definite in their planning.

In general, the basic hypothesis of this thesis has been verified, at least in the cases of Fiji, Chile and Britain. Strategic planning, a management technique from the business world, can be successfully used by an international missionary organization and it does deliver most of the advantages claimed for it.

- iii] The Korean experience of planning was clearly much more negative. On the majority of questions Korea is significantly less positive than the others and often negative.

The majority of Koreans believed their Region did not have a clear plan for the future [Fig. 4.10] and the majority grew to 24 out of 29 when asked if their Region had a clear unified sense of purpose [Fig. 4.19]. They were also the only Region who did not agree that their Region was governed by plans Fig. 4.9].

- iv] All Regions agree that strategic planning has helped them in some way. Even the Koreans agree [22 out of 28] that it helped them "face the issues they needed to face".

- v] The Columbans also looked to strategic planning for help in rethinking its missionary identity and contribution. Mission is in crisis [Chapter 1]. Missiology is in the midst of a paradigm shift. It would be asking too much of a management technique such as strategic planning to provide the missiological paradigm that has so far escaped the best theorists and practitioners of mission throughout the world. However, the process did help the various Regions to come up with creative insights into the nature of mission. In Chile it helped them see the importance of a mission to a cultural minority, the Mapuches, and the need for mission education within the Chilean Church. Both of these were exciting new insights into the nature of mission in Latin America. In Fiji they have been led to appreciate the importance of mission education, of work for justice and religious dialogue and of lay missionaries. In Britain they saw the importance of mission in Britain with its multi-cultural and multi-faith communities. In Korea they were able to isolate a number of imaginative new possibilities especially in the area of mission education and lay mission. Strategic planning has helped begin the search and debate about a new paradigm for mission.

- vi] One of the most telling tests of a process of change, like strategic planning, is to see if it actually resulted in any concrete changes. An analysis of the various reports shows that there have been major changes in Korea, Chile and Britain at least. The purpose of Q.18 [Fig. 4.14] was to ascertain what the members' perception of change was. The replies were interesting. Despite all the changes in Korea a majority of the Koreans [16 out of 29] said there had been no changes introduced because of strategic planning. A possible interpretation of this result is that they did not believe that the changes were the result of planning. This was true in the case of the drop in the number of Columban parishes from 40 to 27. It was not a planned or voluntary change. It was forced on them by the growth of the Korean Church. However, the move into mission education, etc., was freely chosen. Still it seems that the majority of Korean members do not believe these changes were the result of the planning. One third of the Fijians who

responded, 7 out of 19, also did not believe the planning process had produced changes. This is not surprising as the only changes were the setting up of support groups and the decision to take lay missionaries. The Region did not decide on any cutbacks or make any new appointments. Both Chile and Britain agreed strongly that their planning processes had resulted in concrete changes and they were near unanimous in what the changes had been. It was striking that in both cases concrete visionary types of commitments had been taken on. It is possible that this helps to explain the British and Chilean members enthusiasm for their plans. Their free choice of concrete new projects gave them the sense that they were setting the pace rather than being controlled by circumstances. [Quinn,1980].

b) Possible improvements to the questionnaire

Analysis of the results of the questionnaire have revealed a number of areas where it could possibly have been improved. a) There was a lack of clarity in the questions about the members' attitude to change. It would have been valuable to have included a question asking the members what they thought of the future of mission, if they thought change was necessary and if strategic planning had helped the Society change for the better. b) The questions regarding satisfaction were not as revealing as had been hoped and could have been phrased better. It would also have been valuable to have included a question about whether the process of strategic planning had improved their sense of satisfaction. c) A similar question could have been asked about leadership. d) It would also have helped if there had have been more questions about the role of discernment and e) some questions relating to vision or strategic intent.

c) Comments on the four different planning processes

This section will concentrate on a brief evaluation of the various processes, some comments on how this evaluation correlates with the results of the questionnaire and any significant questions raised by a particular Regional process.

Coghlan [1987] concluded that there were eight characteristics to successful planning processes in religious congregations. i) Each emphasised core criteria that became the focus of the different strategic activities. ii) Their strategies pinpointed key issues arising out of the core criteria and the needs of the environment. iii) Process was very important. Building a process of systematic reflection was a

critical success factor. iv] Considerable time was devoted to consultation and consensus building. They needed a wide variety of top-down and bottom-up interaction and participation in defining the strategy. v] All used task forces. vi] Organizational structures were adapted, where necessary, to facilitate the implementation of strategy. vii] To be successful at planning you also need to focus on issues of internal organizational maintenance, such as continuing education, care of the retired and elderly, community life. viii] It was crucial that the leadership played a clear role in owning the processes and in activating them in their formulation and implementation. [Coghlan, 1987 p. 50]. These will be the criteria against which each Regional process will be evaluated.

The Korean Process. The major question regarding the Korean process is to try to explain why it was evaluated so negatively. Since strategic planning was successfully used in the other three Regions it does not seem to be because the process cannot be transferred to an international missionary organization .

Part of the explanation may lie in their context for planning. Theirs was the most difficult context in which to plan. The Korean situation was the most complex and dynamic. The local church was fast taking over many of the traditional Society works. Many members felt insecure about their future and there was a degree of polarisation which undermined much of the process. Ironically it is organizations in such rapidly changing environments that have the most to gain from strategic planning. Thomas [1988]. However, it seems to require extraordinary courage, political skills and wisdom on the part of leadership. It is difficult to tell what influence the context had on the results of the questionnaire. All the other Regions certainly planned in contexts much more favourable to planning. Would they have been as positive if they had been under the same pressure as the Korean members? It would be valuable to do more research into planning in such complex, rapidly changing and pressurised situations. It is likely that the context is a partial explanation for the seeming failure of the Korean planning process to date.

But perhaps the major reason why the Korean process was so unsuccessful was because of the way it was implemented. Assessed against the criteria developed by Coghlan [1987] the Korean Region was poor in many respects. It did not decide on core criteria. It did highlight some excellent objectives and imaginative possibilities but these were not planned for in a concrete or effective way. They only used task

forces in the early stages. Unfortunately their first assembly was marred by polarisation so there does not seem to have been much emphasis on process after that. It seems that in the later phases the development of the plan was left almost totally to the Regional Administration and there was little bottom-up input. The structures of the Region do not seem to have been adapted to facilitate the new "priorities" and there was little on-going education specifically related to the plan. The leadership was very involved in drawing-up all the plans but seemed to be too cautious about aggravating the polarisation in the Region. Time may yet prove them right. On most of Coghlan's criteria the process was not well prosecuted. This may explain why the Korean members responding to the questionnaire are more negative about strategic planning.

There is potential in the "plan". The Region now needs to prioritize among all its works and possible initiatives and to plan in some detail to ensure that these are implemented. The data is already there only the decisions have to be made.

The Fijian Process. Judged by Coghlan's criteria [1987], the Fijian planning process deserved the positive evaluation it gained from its members. They did concentrate on process and building consensus and used task forces. By doing much of their work in large assemblies they also took care of on-going education. They developed an inspiring mission statement, attuned to the mission needs of modern Fiji. They also identified criteria for prioritising their commitments and have tried to "colour code" their apostolates. They are open to question in two areas. i) Leadership. All their "plans" are reports of meetings and it was difficult to tell from the documentation whether their leadership was skilful or weak [Chapter 4 Part I]. Interestingly, the members who responded to the questionnaire were positive about their leadership. ii) Their reluctance to prioritize or make cutbacks. This reluctance is reflected in the results of the questionnaire. They were significantly less positive than Chile and Britain regarding the degree to which they believe their Region is governed by plans. [Fig. 4.9], one third do not believe they have a clear and unified sense of purpose [Fig. 4.19] and they disagree that the Region has made cutbacks [Fig. 4.8]. On the whole the Fijian experience of planning seems straightforward and the results of the questionnaire consistent with the analysis of the documentation. There are no significant questions requiring detailed comment.

The Chilean Process. There were a number of good features to their process: good leadership, the use of task forces, efforts to build consensus, a good discernment process, good participation, criteria to help prioritise, five clear objectives each with an established calendar, realism about personnel resources, structural changes, a programme of on-going education and a flexible process.

This is supported by the results of the questionnaire in which their process was evaluated very positively. They fulfil all of Coghlan's criteria for successful process of strategic planning in religious congregations and there are no significant questions requiring further comment.

The British Process. The planning process in Britain was uneven. Positively, it contains one of the most concrete and imaginative projects of all the Regional plans. The major criticism of the British plan is that it is limited to one specific mission project. There does not seem to have been a thorough assessment of or plan for all the other works of the Regions.

It is difficult to assess the British planning process according to Coghlan's criteria. They did use task forces. They made at least one dramatic structural change in setting up Newham. They did spend time on on-going education. Their Director and his Council gave clear leadership to the process. However, their performance on the other criteria seemed to be mixed. They did not establish a Regional mission statement with core criteria. Their process was mixed. At the early stages many members were involved in work-based groups but it is not clear how involved they were in the later stages of the planning process.

On the evidence of the documentation alone the author was critical of the British process and read the results of the questionnaire with a number of questions. What is the attitude of the general membership to this concentration on the Newham project? Did they feel they had been adequately involved in the decision? What effect does it have on their morale and sense of participation?

It was therefore a surprise to find how positive the membership were about the process in their answers. They are almost unanimous in agreeing that strategic planning has helped them [Fig. 4.20] and that they now have a clear [Fig. 4.10] and unified sense of direction [Fig. 4.19]. The members also have a positive opinion of

the process of communication [Fig. 4.15 & 4.16], of participation [Fig. 4.17] and of their leadership [Fig. 4.26].

However, a significant question remains: Why do the members of the British Region rate their process so highly when it concentrated almost exclusively on the Newham project and did not contain any mission statement, criteria or assessment of all other works of the Region?

d) A comparison of the processes in the Four Regions

In picking four distinct Regions with quite different experiences of strategic planning it was hoped that a comparison of the various processes might reveal which process was the best and isolate the reasons why.

The initial analysis of the documentation led to the belief that the Chilean plan and process was superior to others [c.f. Chapter 4 Part I]. However, there was no clear evidence to support this conclusion in the results of the questionnaire. The Chilean members are very positive and are significantly more positive than the other Regions regarding communication: between members [Q. 19], with their Regional superiors [Q. 20], and with the local church [Q. 22]. But they are not significantly more positive than Britain or Fiji on a sufficient number of questions to establish that they were clearly superior. Actually the British members had almost as positive an opinion of their process as the Chilean members had of theirs. This was a worrying factor for some time because it still did not seem to have been as good a process and its plan was much more limited in scope than the Chilean plan.

One possible explanation for the positive evaluation of the British members for their process may be the enthusiasm of the members for the new British Region. They were all searching for a new and distinctive identity. There was a good spirit of co-operation and a desire to ensure that the new Region was a success. This probably does help to explain some of their enthusiasm for and positive opinion of their planning process, but there may be another reason more intrinsic to the nature of planning and more revealing for the purposes of this thesis.

Pascale [1988] and Hamel & Prahad [1989] stressed the value of "strategic intent" or vision rather than formal detailed planning. It is vision that gives the members unity and enthusiasm for the goals of the organization. Vision also encourages them

to develop the initiative and flexibility necessary to meet the challenges of the future. There is a new vision for mission in Britain implicit in the Newham project and it seems that it has given inspiration, direction and unity to the British Region. It is a vision that emphasises a positive and distinctive mission for the Columbans in today's multi-cultural and multi-faith Britain. The plan for Newham also had a number of the characteristics that Quinn [1980] identifies with successful plans. It is easily understood and decisive. It has motivational impact. It is compatible with the environment, but sets the pace and determines the course of events rather than just reacting to them.

The importance of Newham and similar projects in the planning process may have been undervalued. It seems that, although they fall far short of a comprehensive plan, they may be capable of providing the vision that Pascale and Hamel & Prahad believe is crucial in building up morale and encouraging unity and initiative. One or two imaginative and freely chosen projects may make up for other deficiencies in planning. Although the Newham project may have had little to do with the daily work of many members at the same time it may have symbolised the way they feel the Region should be going and hence have provided inspiration and a sense of direction. It is also likely that freely chosen, imaginative projects have a significant effect on the members' attitudes across the board by giving them the sense that they are determining the course of events rather than being controlled by them. [Quinn, 1980]. Such positive feelings of being in control would then have a carry-on effect on questions about sense of direction, unity, morale, satisfaction, communication and participation.

It would require further research to establish the importance of imaginative projects in planning but there is possible support for emphasising their importance in both the Chilean and Korean results. Like the British, the Chileans chose a new imaginative project and there is considerable enthusiasm in their Region for their planning process. On the other hand the negative evaluation of the Koreans may be partially explained by the fact that they were under the most pressure and could only react to rapidly changing events.

What conclusions can be drawn from the four different processes? The comparison does seem to establish the validity of Coghlan's eight characteristics of successful planning in religious congregations. [Coghlan, 1987]. There is also some evidence to

show that the freely chosen projects that determine the course of events rather than reacting to them can have a significant effect on the evaluation of the process by the members. [Quinn, 1980]. However, it has not been possible to identify which process was the best or to isolate the reasons why. With the exception of Korea, the experience seems to have been very positive in each country. As well the situations and planning processes in each of the four Regions were so diverse and the differences in the processes so numerous that it is difficult to isolate any one factor as being the significant factor, the difference between success and failure.

II. Discussion of the Major Theoretical Issues

There is no all embracing definition of strategic planning. Mintzberg [1990 b] in his review of all the schools identified as many as ten distinct schools. The differences between the schools can be small enough at times but the major division would be between the earlier schools, Andrews [1980], Ansoff [1965], Porter [1980] & Steiner [1979] who see planning as an intentional prescriptive process based on a rational model of decision making and the later schools Quinn [1980], Mintzberg [1987], Pascale [1988] and Hamel & Prahad [1989] who emphasise the gradual and emergent nature of strategic planning. As the world became more complex and dynamic and growth became more problematical, experts came to view organizations more as social and political systems and emphasised learning, incrementalism, flexibility, leadership and vision rather than rational, intentional, pre-planned approaches. The schools are so numerous and the differences so subtle that there is little purpose in running through each school. The following are the key areas of contention: a) the advantages of an emerging, incremental approach over a rational and prescriptive one; b) the need for a long term political process rather than a pre-determined rational plan; c) the importance of vision-driven change rather than problem-driven management; d) the need for cultural and structural change; and e) differing understandings of the role of leadership. These issues provide a useful framework under which to discuss the major findings of this thesis. Besides these five headings it will be important to consider some of the special concerns faced by an international religious organization.

a) Incremental versus rational and prescriptive

The principal criticism of the earlier formal schools of planning was of their rational, intentional, and prescriptive nature. People like Wrapp [1988], Quinn [1980] and Mintzberg [1987] questioned whether managers actually worked in such a formal

and rational way, whether implementation can only start when plans are fully formulated and whether fully articulated plans did not create rigidity and resistance. They preferred a more open, flexible approach where the "plan" emerges over time and is often only recognisable after the event. The plan or pattern is built up gradually by leaders making wise decisions according to the changing needs. It is vital to remain open and flexible to make the most of opportunities and even mistakes.

However, the Columbans in the early stages of their planning processes were largely unaware of the incremental or learning schools. Their early approach was based on Coghlan [1987] and Steiner [1979]. The original *Guidelines* sent out by the General Council at the beginning of the process of strategic planning in July 1989 were modelled on Coghlan's formal approach. The General Council's comments on the early plans were inspired by formal planners such as Steiner [1979] and Thomas [1988]. Steiner is a member of the formal, rational school and Coghlan, at least in his earlier writings, as a follower of Andrews [1980] and Hax & Majluf [1984], also had a formal, rational approach to planning.

In other words, right up till the time of the questionnaire, the basic approach to strategic planning was that of the formal, rational school. Yet it seems to have been successful in helping at least three Regions assess, plan, gain a clearer and more unified sense of direction and improve communication, morale, participation, leadership and so forth. It never seemed to run into the major problems highlighted by the critics of formal strategic planning. Fortunately the process was never so rigid that there was no learning along the way. In fact, it was preeminently a learning process going through several drafts. A number of changes in approach have been made as the Society learnt from mistakes or from serious deficiencies. Plans were never set in stone in a way that stifled initiative or attracted internal resistance. As a religious organization with "more markets than competitors" the Society was not concerned with profit maximisation and growth in market share so the Regional processes were not excessively mathematical or mechanistic. They were able to escape much of the excessive detail and paralysis by analysis that bedevil formal planning in business sector.

Perhaps this is because of Coghlan's process [1987]. Coghlan's end product is a strategic posture rather than a detailed plan. A strategic posture is made up of a

mission statement with three or four criteria or challenges for the next 3-5 years and some corporate objectives arising from these key challenges or issues. This approach, although strictly within the formal school, also seems close to the concept of strategic intent or vision as championed by Mintzberg [1987], Pascale [1988] and Hamel & Prahalad [1989]. In religious organizations the process of change is necessarily more gradual. Efforts are made to bring ministries into line with the criteria rather than planned out of existence. The process is more democratic. Because all involved are permanent members of the congregation greater attention must be given to encouraging participation and building consensus. Although the commitment and involvement of leaders or superiors is crucial, they do not have the dominant role recommended for them in secular strategic planning. They do not determine the mission statement or long term goals on their own. These emerge only after much reflection and discussion by the whole congregation. So, of necessity, the Columban process of strategic planning was slow, iterative and interactive. It involved much learning, adapting and reformulating as the process went on. The emphasis had to be on the process more than the concrete plans although every effort was made to try to get the Regions to be as concrete as possible. Finally, strategic planning was so new to the membership that they are still coming to grips with aspects of strategic planning like mission statements, criteria and the details of planning, implementation and evaluation.

In general, it seems that the formal approach to planning has worked for the Columbans and that many of the criticisms of the other schools did not prove entirely valid. However, there are lessons to be learned from a more detailed look at the various schools.

Disjointed incrementalism. Wrapp [1988] believed that *Good Managers Don't Make Policy Decisions* instead they play the power game, keep their options open and muddle with a purpose. Loasby [1988] thought long-range planning would block fresh thought and imagination and advised managers to do as little planning as possible. Lindholm [1959] wrote of *The Science of Muddling Through* or "disjointed incrementalism". Policy making must be serial, remedial and fragmented. Managers solve problems with little regard for ultimate goals.

These theories proved of little use in the Columban process of strategic planning. They do highlight the need for leaders who are flexible and have political skills but

this does not seem to have been a problem for the Society in the past. If anything, most leaders have been "shrewd, resourceful problem-solvers" with a keen sense of the political realities in their Regions. However, the Society was in a state of crisis, a crisis of identity, personnel resources and leadership. Many members felt the Society was drifting. Refounding Groups were set up to demand better leadership and a more coordinated sense of direction. The "science of muddling through" was not seen to be enough, so the General Assembly decided on a process of strategic planning that we have seen has not resulted in the dangers foretold by Wrapp, Loasby and Lindholm.

Logical Incrementalism. Quinn [1980] took up many of Lindholm's criticisms but insisted on a style of management that was logical not disjointed, incremental not piecemeal. Quinn is acutely aware of the political problems of formulating plans and believes that leaders develop them best incrementally. Once again the strength of Quinn's theory is that it takes the political and process sides of developing a strategic plan seriously. It was important for the Regions to build consensus and to involve members in drawing up the plans.

However, it was only as a result of the General Council's constant requests that the various Regions engage in a specific programme of strategic planning and be as specific as possible that real progress was made. Before the assessment and planning process began the Regions and their leadership seemed to be prepared to "muddle through" from decision to decision. Little attention had been given to planning systematically for the future and the Society was suffering a crisis of leadership. Its leaders were good "disjointed incrementalists" but often urgent matters forced the more important matters of future planning off their agendas. Quinn seems to have extraordinary faith in the quality of leaders for he suggests leaders with a vision that they are consciously manoeuvring into place throughout the organization. At the beginning of the process there were few leaders of that calibre in the Society, few who had a developed vision for the future. Perhaps it was expecting too much of them in a time of such transition. It took a formal process of planning and the demand to think concretely and to plan in some detail to bring about that kind of thinking. Interestingly enough Quinn [1980] himself claims that the three times when it is best to be more specific with your plans are when you want to precipitate action, in times of major transition and after a crisis when you need distinct, clear goals to focus action. The Columbians were in a time of major

transition and the leadership needed to precipitate action, so a more explicit and specific public process was needed.

Crafting strategies. Mintzberg's classic image of the planner is that of the potter. Mintzberg [1987]. The potter at her wheel has a vision of what she wants to produce but no detailed plan she relies on her experience and skill to shape the wet clay into her vision. It emerges slowly and often mistakes become opportunities. Mintzberg criticised the rational, formal school of planning:

i] because of its highly stylised, formal and rational nature it denies the organization a chance to develop. In the Columban case this does not seem to have been proven true. Most of the time the plans developed with each new stage. Perhaps that was because the process was not overly formal or detailed.

ii] because of its promotion of thought independent of and prior to action it has denied itself the opportunity to learn. Once again this has not proven true. Although the basic inspiration of their planning process came from the rational, formal school it was not applied rigidly. In the Columban case it was very much a process of planning - acting - reflecting - planning - acting.

iii] because strategies are both plans for the future and patterns from the past. Often it is only possible to discern the pattern as we look back over the past. Attention had to be given to the Columban past but, as Mintzberg [1987] himself points out, although change often seems to be continuous, there comes a time when, as the world changes, a strategic revolution must take place. The Columbans were facing just such a time. They could not go on planning in a continuous way. The pattern had to be broken. Their missionary identity and role was also in transition and it was not helpful to try to discern the future pattern from the past.

iv] because strategies need not be deliberate - they can also emerge from the potter's hands. As we saw in discussing the Incrementalists, at this stage of the Columban history this did not seem to be happening and it was only after serious formal efforts at planning were undertaken that plans began to emerge. Mintzberg [1987] also moderated his position on this question when

he admitted that "strategy making walks on two feet, one deliberate, the other emergent". By this statement Mintzberg appears to build a bridge between the two main conceptions of strategic planning.

b1 The need for a long term political process

Strategic planning has proved to be a far bigger and more profound project than the Society imagined when they started. When it was begun the General Council thought that it could be completed within a year. It has now lasted more than four years and is proving to be the major programme of its whole administration. What is really at stake is an organization-wide, consistent and long-term programme of development, change and renewal. The assessment and planning processes proved to be a valuable tool for promoting systematic reflection about the future, substantial change and for training in leadership. However, it would have been better if the Society from the beginning had have approached planning more consciously as a process of managed change.

Michael Beer in his book, Organization Change and Development [1980] argues that there is substantial evidence that organizational change is only possible when dissatisfaction among the members is high, so high that it is greater than the cost of change to the majority of individuals and groups that make up the organization. Nygren & Ukeritis [1993] in their comprehensive three year study of more than 10,000 United States religious make a similar point. Religious life in the United States is in crisis for much the same reasons as missionary life is, falling numbers, crisis of identity and widespread questioning of their traditional works. To survive it is in need of transformational change, but transformation usually only begins with a crisis that indicates that the members' current shared understandings are no longer adequate. The crisis must be strong enough to "unfreeze" present understandings and open them up to the process of change.

This highlights one area in which the Columbans could have improved their process of strategic planning, namely preparation. The General Assembly had decided that it was necessary but no systematic effort was made to prepare the members or even the Directors who were going to have to administer the process. Laycock identifies four key questions an organization must ask itself before beginning a process of strategic planning: i) Is the organization strong and stable enough for this undertaking? ii) Is the need for change recognised? iii) Are the necessary resources

of time, money and personnel available? iv) Is there enough commitment? [Laycock, 1990].

The Society proved strong and resourceful enough but in the early stages the General Council could have done more to convince the members of the need for change and to build commitment and competence for planning. The General Council did not understand the process itself and relied on the authority of the General Assembly's mandate. In hindsight this was not enough. A special effort should also have been put into training the Regional leaders in planning for, by necessity, much of the project had to be left to them to administer. As an international organization working in 16 different countries it was impossible for the General Council to be responsible for Regional processes. Their role was co-ordination and up till the Melbourne Inter-Regional Meeting in 1991 all contact with the Regional Directors was by mail. There was little opportunity for the face-to-face conversations or seminars that would normally be necessary to ensure middle management understood what was required of them and was confident and enthusiastic about the project. The Melbourne meeting did provide a considerable boost for the process.

With the exception of this weakness in preparation, the General Council has administered and co-ordinated the planning process well. The constant emphasis has been on the process being even more important than the plan. The need for leadership, participation and discernment have been continually stressed. The various Regions have been uneven in the way they implemented these processes but as can be seen from the results the Regions that did have good, participative processes and an atmosphere of discernment seem to have been more successful. After the first drafts proved largely disappointing the General Council has engaged in a constant dialogue with each of the Regions trying to build an awareness of the crisis facing the Society and of the real questions it needs to face. It has also tried to provide leadership training for the various Regional Directors. Now that the process is well under way and the serious questioning is beginning perhaps more attention needs to be given to providing the second element Beer [1980] highlighted in his analysis of the possibility of change, namely a new model or vision of the future.

cl Vision-driven change rather than problem-driven management

Pascale [1988] in studying the success of Honda in the United States concluded that their success could not be put down to the big brains of their planners but the little brains throughout the organization who contributed incrementally to the success of the organization. Hamel & Prahad [1989] claim that the cohesive and driving force that enables Japanese organizations to be so successful and flexible is "strategic intent" or vision. It is the responsibility of an organization's leadership to provide a vision of the future and a structure and culture within the organization that will encourage initiative and flexibility. [Hamel & Prahad, 1989; Pascale, 1988; Peters & Waterman, 1982; Kantor, 1989; Handy, 1989; Burnes, 1992].

The Columban process of strategic planning received a real "shot in the arm" when members came to realise the serious implications of the Society's declining numbers. This came around the time of the Melbourne Inter-Regional Meeting. Before that most Regions tended to ignore their real personnel limitations and wrote vague visionary documents committing themselves to even more goals than they had previously. They resisted thorough assessments of their apostolates, prioritising, cutbacks and so forth. At the Melbourne meeting they were able to get a Society-wide picture and the General Council began to convince them of the seriousness of world-wide personnel situation. There was a marked improvement in subsequent plans and a greater willingness to prioritise and "colour code" their apostolates. This was something most Regions did not want to do and still dislike doing even though they may now believe it is necessary.

However, there is some evidence to show that planning motivated purely by problems, such as declining numbers, will not get the Society too far. There is little hope, no vision and no life in such a problem-driven approach. As well numbers are declining at such a rate that as soon as all the positions are filled a gap appears somewhere else. Events always seem to be ahead of the planners and the impression grows that they are no longer in control just trying to catch up all the time. Such a feeling had a serious negative effect on the Korean experience of planning and there was a dramatic difference in the British and Chilean evaluations partially because they freely chose imaginative new projects that gave them a sense of setting the pace and being in control.

A life-time missionary vocation entails many sacrifices but it thrives on idealism. Missionaries need a vision to give their lives for and to motivate their planning. Senge [1990] talks in terms of creative tension. "Without vision there is no creative tension. Creative tension cannot be generated from current reality alone. All the analysis in the world will never generate a vision. Many who are otherwise qualified to lead fail to do so because they substitute analysis for vision. They believe that, if only people understood current reality, they would surely feel the motivation to change. They are disappointed to discover that people 'resist' the personal and organizational changes that must be made to alter reality. What they never grasp is that the natural energy for changing reality comes from holding a picture of what might be that is more important to people than what is." [Senge, 1990]. Nygren & Ukeritis [1993] make a similar point in their survey of U.S. religious. They conclude that if religious life is to survive one of the things that is most needed is leaders who can focus the attention of their members on a vision that will unite and inspire.

Although the Columbans needed the realisation of crisis to give impetus to their process of change it seems they now need a new model, vision or statement of strategic intent to carry the process further and to mobilise the members commitment and creativity. [Pascale, 1988; Hamel & Prahad, 1989; Senge, 1990; Beer, 1980]. People motivated by a vision and with the positive feeling of being in control are going to be much more committed and creative. The vision-driven process of change also has the advantage that, in a time of decline in numbers, it will keep the members' minds focused on the vision and protect the goals from being undermined by the many daily problems that often pull the leaders and members in other directions.

d) The need for cultural & structural change

The culture of an organization can have a profound hold on its members and the deep influence on its future. [c.f. Chapter 2] Unfortunately little work has been done by the Society in this area of cultural change and little attention was given to it in the questionnaire so it is not possible to give much more than impressions.

It seems clear that cultural change is one of the major challenges facing the Society if it is to successfully adapt to the future. Much more work will have to be done along the lines suggested by Schein [1985], Argyris [1983 & 1990] and Senge [1990] if the Columbans are to be able to understand the culture of the Society and then

surface and challenge its "defensive routines", assumptions, prejudices, fears and deeply held beliefs. This will be needed to guarantee change in the future.

Although there has been little formal analysis of the Society's culture there are three aspects that often seem to hinder strategic planning. The first is the "religious or missionary" culture which does not encourage people to think in terms of mission statements and criteria, nor of prioritising for fear of hurting others, nor of cutbacks because missionaries find it difficult to renounce good works. They tend to take on more and more rather than face up to their limitations.

The second relates to the basic configuration of the Society. In Mintzberg's terms the Society has many of the characteristics of a professional bureaucracy. [Mintzberg, 1983]. The Society is a service-oriented organization made up of highly trained professional missionary priests who would normally expect to be allowed to meet the needs of their people or parish in relative freedom. Much the same as doctors in a clinic, they tend to regard the administrator and organization as necessary to allow them to do their work but their concentration would be more on their speciality and they would not always have a great feel for the whole organization. With the Columbans this is exacerbated by the international exposure of the Society with vastly different needs in each of the countries. There is a strong culture of democracy which limits what leaders can do. There are also strong demands for consultation in decision making processes. The cohesion of the organization comes not so much from rigid organizational control but from their common professional training. But the professional loyalties can cut across loyalty to the organization. Many members have great loyalty to the priesthood and to their diocese and parish and it is only recently that they have been experiencing a tension between their normal priestly understanding and loyalties and the new priorities of the Society.

Finally, there is a lack of a culture of leadership in the Society. Traditionally strong leadership has not been encouraged and in recent years there would have been considerable ambivalence about the role of leadership in the Society. This is a trend Columbans share with many modern day religious congregations. Some equate leadership with authoritarianism and resent it. Others insist on a style of leadership where everyone is responsible for everything and no one has a special responsibility to lead.

Strategic planning, with its demand for leadership, vision, planning, prioritising, cutbacks and so forth, is a direct challenge to all these negative aspects of the Society's culture. However, much work remains to be done.

e) The importance of leadership

Leadership is seen as crucial by all schools of planning. [c.f. Chapter 2] A review of the Columban planning process shows that leadership has been mixed but that it is improving because of the attempt to plan.

The General Council's Leadership. The General Council has been very committed to the process of planning. It has demanded three drafts and devoted an entire Inter-Regional Meeting to the assessment and planning process. It has also called for another such meeting to be held in Omaha, the United States in 1993. In many respects the planning process has become the key tool and central project of their administration. It has also been able to involve the local Regions in the process, have created a climate of trust and continued a steady dialogue with the Regions over the last three years. The response to the two questions explicitly devoted to the General Council in the questionnaire, Qs. 15 & 21 are positive [Figs. 4.13 & 4.15]. However, in hindsight their initial *Guidelines* could have been improved by including a more focused mission statement with criteria. It would have given more direction to the process in the early stages and would also have provided criteria for the Regions with which to plan. This was to prove a central difficulty with planning in almost all the Regions. None of them came up with criteria on the first round. Korea and Britain still did not have criteria when the third round was completed. It was only after the second drafts of Regional plans of action had been submitted that the General Council recognised the need for it to provide a focused mission statement and implementable criteria to enable the various Regions to decide priorities and cutbacks. These criteria were presented to and approved by the Melbourne Inter-Regional Meeting and have helped provide direction to many Regions since then. However, there were two problems in coming in so late: i) it seriously undermined the quality of planning process over the first two phases, and ii) by the time they came the planning processes in each Region were well under way and commitments had been made so it was harder to integrate them into their processes.

On the other hand, it could be argued that it was fortunate that a mission statement was not imposed on the Society at the beginning. It was only after trying to decide

priorities that Regions and the General Council learnt to appreciate the need for a mission statement and criteria. This was an important instance of the reflection-action-evaluation-intervention-action- nature of the process. It also meant that the mission statement and criteria were more acceptable when they did come. Directors also felt they had been involved in drawing them up even if only indirectly. As Alvarez [1984] pointed out it is crucial for religious congregations that the members be formally involved in decisions about mission statements. Arbitrary imposition by the central government would be seen as authoritarian and counter-productive.

Regional leadership. With the exception of Chile and Britain²⁹ the quality of leadership on the first round of the planning process seemed poor. The General Council had to write to all Directors asking them to take leadership over the planning process in their Region. In recent years Society leaders have been more managers than leaders. This has worked well up till recently but the crisis brought on by the radical change in the understanding of mission and the steady decline in the number of personnel has increased the demand for genuine leadership. The Society now needs bold leaders with vision who are builders of learning communities Senge [1990] and creators of a culture of change. Schein [1985] and Burnes [1992]. As Senge [1990] points out, the rate at which organizations learn may become the rate at which they will survive. In times of rapid change the Society needs vision-driven leaders not problem-driven managers. [Senge, 1990; Leavy ?]. Leaders must be responsible for generative learning rather than adaptive or problem-solving learning.

Recent research into the crisis in religious life has confirmed these insights. Sheeran [1993] has stressed that if religious life is to be renewed it needs leaders who are prepared to intervene in the life of the congregation to force it to assessment, choices, planning, renewal and ultimately conversion. Nygren & Ukeritis [1993] identified leadership as the critical factor in the transformation of religious orders. Leaders are needed who can communicate a vision and sense of mission. Nygren & Ukeritis [1993 b] have also published the results of their extensive research into the differences between what their survey identified as "outstanding leaders" and "typical leaders". The differences are similar to those between leaders and managers outlined by Zaleznik [1992] and Leavy [1992]. The outstanding leader has deep faith, a clear vision of the future, ability to articulate

29 Because their first draft was the last to be formulated the British leadership had the advantage of being forewarned about the need for leadership.

and implement that vision, a high need to achieve and is characterised by both objectivity and compassion. While sensitive to individuals he or she is less concerned with counselling individual members and does not need to belong.

However, for the Columbans it is not just a question of the quality of leadership. It has also been a question of culture. Previously, there was no culture of leadership, but the planning process has improved this by lengthening the time horizons of the leaders and forcing them to think more systematically about the future. It has also highlighted the importance of leadership and begun to create a culture supportive of it. Now it is important that the General Council provides for the Society's leaders training in leadership that will enable them to be more confident and competent in their leadership role.

f) Planning in religious organizations

Sheeran [1993] in his analysis of renewal in religious congregations has come to the conclusion that what is really at stake is conversion. Religious do not need more analysis, information or updating but a thorough assessment of their present apostolates and the courage to make some hard choices and act on them. Renewal without hard choices and action has proved ineffective. If the problems of religious life are identity, relevance and declining numbers then a radical evaluation of its apostolates is an essential component of authentic renewal in any congregation. He believes it is most important to reappraise the long standing, dominant and established apostolates. There will be great resistance to such a reappraisal but the reality is that these apostolates frequently serve needs far removed from their original purpose. Often it is the congregation's commitment to these traditional works that may be the chief obstacle to change. Religious are also particularly vulnerable to "good works". Frequently they cannot give some apostolate up because it is a "good and worthwhile work". For Sheeran the important question is not is this a good work but is it the most relevant or appropriate to the needs of the world. He has come to the conclusions that in some ways "good works" and our inability to relinquish them constitute a crisis for religious congregations and "the principal obstacle to real change is not the recalcitrance of 'bad' religious but the intransigence of 'good' ones". [Sheeran, 1993 p. 85].

There have been echoes of this in the Columban experience of planning. The General Assembly mandated strategic planning because it wondered if it was not

time to question the appropriateness of many of the Society's "good works". But each Region found it difficult to prioritize among its many good works and they found it even more difficult to give up "good works". It takes time to be able to affirm that a work can be good but still needs to be given up because there is something even more relevant that should be done. It seems to take a lot of faith and courage to renounce a good work. Indirectly Sheeran has highlighted a number of reasons why strategic planning is a very appropriate tool for renewal in religious organizations. It does require assessment and rethinking, force decisions, demand faith, and encourage participation and communication.

The importance of 'discernment' in planning for religious organizations. No leader in a religious congregation can ignore the importance of faith and the members' sense of vocation in planning or managing change. "The rational, political, contingency approaches to decision-making of the secular arena are insufficient for the faith perspective religious bring to decision-making. Religious decision-making must be grounded in the faith on which mission and vocation are based. Discernment is the process that integrates prayer and decision-making, taking the process of making decisions beyond what is rational or political to the level of the sense of the promptings of the Holy Spirit." [Coghlan, 1987 p.47]. Nygren & Ukeritis [1993] also stress that an essential skill of the transformative religious leader is the ability to tap the spiritual energies of the group.

The General Council in its original *Guidelines* stressed that discernment was a crucial part of the planning process and they have issued separate Guidelines on discernment for all important decisions especially the selection of Regional Directors. The theology and theory behind this is that it is only by placing these important decisions in the context of faith and vocation that members will be able to get in touch with their deepest shared motivations, overcome their normal prejudices and fears and find the freedom to make difficult decisions. Chile had an excellent discernment process guided by a Chilean Jesuit skilled in discernment. Fiji and Britain did not have as formal or professional a process of discernment, but they met often as a total group and tried to consciously put their decision in a faith context. Korea alone had little formal discernment during their planning process. This is reflected in the results of the questionnaire. Chile is very positive, Britain and Fiji are also positive and only Korea is negative. [Q. 17, Fig. 4.13]. It is impossible to isolate this as a major reason for the success of the Chilean, Fijian and

British processes or for widespread dissatisfaction with the planning process in Korea but a more serious effort at discernment might have helped the Korean Columbans overcome some of their polarisation. It is also difficult to prove that the Chilean process of planning was significantly better because of a better discernment process. However, three aspects of the Chilean planning process suggest support for the value of discernment. i) The significantly higher evaluation they give to communication within their Region. ii) They were the only Region that actually decided on voluntary cutbacks. iii) They did come up with criteria to assess all their commitments. Improved communication is one of the promised outcomes of a discernment process and voluntary cutbacks and criteria are significant achievements because they are rare in religious groups. [Alvarez, 1984]. Normally cutbacks can only be achieved in the context of an appeal to a member's most basic sense of vocation. That it was done successfully and cheerfully in Chile may be evidence of the value of their discernment process. It may also explain why they were so positive about their process, and about participation and communication. It is an area worth more research.

CHAPTER 6 CONCLUSIONS AND A SHORT REFLECTION ON THIS THESIS

Introduction

This final chapter will have three sections. The first section is devoted to listing the major conclusions of the thesis. The second is a reflection on the advantages and disadvantages of the methodology of the thesis. The final section will identify areas of possible further research.

I. Conclusions

1] The results show that strategic planning can be successfully transferred from the world of business to an international missionary organization and that it can help such a congregation improve: i] its sense of direction and unity; ii] communication; iii] participation; and iv] morale. It is a good tool for leadership training because it forces one to look ahead and to ask and answer the type of questions leaders must face.

2] In religious groups it is important to focus on a few core criteria, to spend a lot of time on process, discernment, consultation, task forces and on-going education. It is crucial that leadership is committed and involved. There is some evidence to show that a good discernment process can improve communication and participation and unite and motivate people to make the difficult decisions needed for effective strategic planning. It is possible that business organizations could also benefit from some adapted form of discernment process.

3] It is important that plans be easily understood and decisive, determining the course of events rather than just reacting to them. One or two freely chosen, imaginative projects can have a significant influence on the morale and sense of purpose of the members and possibly make up for other defects in the planning process.

4] The Columban experience of planning also indicates that the more formal, rational approach to planning is the best approach for religious and missionary congregations, at least in the early stages. Missionaries, priests and religious need the discipline of the rational approach with its stress on mission statements and

criteria, environmental scans and internal reviews plus the demand to prioritize and plan concretely and in some detail. There is ample evidence in the literature and in the Columban experience that missionaries and religious people find all these tasks difficult. The unspecified and intangible nature of their mission allows them many escape routes, conscious and unconscious, from the rigours of planning. The formal, rational approach can force them to be more concrete, to face up to their limitations, to be more specific about their mission statements, to develop criteria, to prioritise and to plan.

5] The history of the Columban planning process shows how difficult it was for them to assess, prioritise and plan. The General Council had to constantly push Regions to be more concrete, to be more realistic and to give more explicit leadership. It is doubtful that a more incremental, learning, crafting approach would have worked, especially at the earlier stages. Actually the principal reason the Society decided on a process of strategic planning was to arrest the drifting that had resulted from many years of incremental management and change. It was also a time for a more revolutionary change, when more assertive leadership and more specific and deliberate plans are needed.

6] The real goal of strategic planning is not the production of a detailed plan but the development of an organization's capability to become more creative and responsive. It is the capability of the Society, in terms of its structure, systems, culture and management style, that is the strategic solution.

7] A sense of crisis was important in motivating the Columbans to begin to change but alone it will not take the Society very far. Now that the process has begun more attention should be given to developing a vision, to cultural change, to training leaders and to the on-going education of its members. Strategic planning can be an excellent vehicle for a consistent, long-term programme of change and renewal in an international missionary organization.

8] The school of planning that probably most accurately reflects what has happened with the Columbans is the configurational school Mintzberg [1990 b]. Mintzberg, in his debate with Ansoff, came to admit that the deliberate and learning schools go hand in hand. [Mintzberg, 1991]. He and other members of the configurational school believe that there is no one right way to plan instead we

should take into account the different configurations of organizations within their different environments and the distinct period of their life cycle. You must use each of the different possible methods at its own time in its own place. This is verified by the Columban experience. The Society needed a more deliberate, rational, intentional and centralised approach to get the process going. To ensure that the process continues they now need a more political, cultural, process and learning approach.

9] If a similar international missionary organization decided to begin a process of strategic planning, the following lessons learned from the Columban experience would be valuable to keep in mind. a] It is important to prepare well for planning. This will involve convincing the members of the need for change and training their Regional leaders. The General Council should meet with all their Regional Directors before the process begins to build commitment and to train their Regional leadership in strategic planning and the management of change. They would still have to learn by doing and there would still be a need for further meetings between the General Council and the Regional Directors but an early meeting would ensure a far more effective process. It might also bring greater unity to the various processes, enrich them all and assist Directors where the situation for planning was more difficult. b] They will need to devote time to leadership training. Normally leadership training for religious concentrates on presentation skills, handling of individuals and groups and on managing conflict. However, if there is to be real change in religious congregations these skills will also have to be complemented by training in planning, managing change, envisioning the future, prioritising and building learning communities and cultures.

II. The Advantages and Limitations of the Methodology

From the beginning, the methodology of this study has been flexible and involved a process of on-going learning and adaptation. Each stage has been adapted or reformulated in the light of the results of the previous stage. This method of research enjoys most of the advantages mentioned by Burgess [1985] and Sherman & Webb [1988] for such a mixture of qualitative and quantitative research: the researcher works in a natural setting; the methodology is consistent with the topic being studied; the studies may be designed and redesigned as needed; the process is more experiential, participative, collaborative and, therefore, encourages a sense of mutual learning. The author, the General Council and the membership were all learning together, if not at the same pace. In the long run this may result in a greater sense of participation and a more effective process of change. Because of the author's role as a senior executive, he has had comprehensive access to strategic or organizational issues and to individuals. He has not had to rely on informants. He has inside knowledge of the culture and politics of the organization and may have found more acceptance from the members than a researcher from outside with a separate personal agenda. [Gummesson,1991].

Openness and flexibility have been crucial to the Columban process of strategic planning and to this study. As the process progressed and the documentation mounted the shortcomings of the various plans and planning processes became clearer and some of them were able to be corrected and redesigned. It was obvious that everyone was constantly learning. The aim of the study was not the verification of a predetermined idea or theory, but discovery leading to new insights, better planning and more thorough change.

Traditional researchers may have doubts about the scientific worth of such an Action Science approach. Many might question the validity and possibility of generalising the results of such a local, participatory and constantly changing study. Action researchers recognise that one of the aims of research is to generate theory but their attitude and approach to generating theory is different. Being action or change-oriented people their concentration is local and their approach a combination of scientific and hermeneutical approaches. [Gummesson, 1991]. Their theory is therefore "local" or specific to the particular process of change they are

involved in. This theory is then tested in action when the researcher participates or intervenes. Theory can then be verified or modified through action. In the long term, the researcher can develop a more general theory based on his experience in a series of individual action research projects. "Theory can then be developed from a specific, local theory [substantive theory] to a more general theory [generalized substantive theory and formal theory]. This creates an opportunity for researchers to increase their theoretical sensitivity and ability to act when presented with new situations." [Gummeson, 1991 p. 180].

This thesis has been very specific or "local" in its focus. It has been confined to four Regions of a small international missionary organization. The sample for the questionnaire was small of necessity. The subject was complex and diverse and the methodology flexible so it is difficult to reach definite conclusions. But it has been possible to gain insight and increasing "theoretical sensitivity". Hopefully the thesis will extend the literature of strategic planning to another new area, the international missionary organization and add to the number of local theories from which practitioners, researchers and theorists will be able to draw some more general theory or at least hypotheses.

Interestingly, Mintzberg came to a similar conclusion at the end of his review of all the schools of strategic planning, "we believe the starting point for research should increasingly be case and context as opposed to concept. We need to ask more questions and generate fewer hypotheses - to allow ourselves to be pulled by the concerns out there rather than pushed by the concepts in here. And more often we need to be comprehensive - to concern ourselves with process *and* content, statics *and* dynamics, constraint *and* inspiration, the cognitive *and* the collective, the planned *and* the learned, the economic *and* the political." [Mintzberg, 1990 b p. 208]. Mintzberg was moved to this conclusion by the narrowness of the various schools, something that has been mirrored in the analysis Columban process. No one theory is an adequate basis on which to plan. All are useful at different places, for different configurations and at different stages of their history.

Of course, there are disadvantages to the researcher also being a senior executive of the organization in question. The author has found that as a senior executive his primary focus was on action or change. Research was secondary. He did not always have enough time for adequate documentation, reporting and research as he tried to

maintain the pace of change. He found it hard to maintain distance all the time. He was accepted as belonging and understanding, witness the 81.48% reply rate to the questionnaire, but he was concerned that members might have, consciously or unconsciously, told him what he wanted to hear. Fortunately there is no evidence of this in the wide variety of responses. Finally as a practitioner he often found himself long on first-hand experience and questions but short on the theoretical understanding necessary for practice and research. This was shown by the author's and the Society's almost total ignorance of the literature when the process was begun. The author's knowledge of the various schools grew as the process progressed. While this has enhanced the sense of everyone learning together it has impoverished the actual planning process and the study.

The questionnaire is a particular case in point. It had to be sent out in March 1992 while the process was still fresh in the minds of the members. To have waited any longer would have risked getting fewer and more distorted replies. It would have been better to have completed all the theoretical reading before sending out the questionnaire. Now the author has the problem that when he comes to analyse the results of the questionnaire with a theoretical background much richer than the theoretical background on which the questionnaire was designed.

III. Areas for Possible Further Research

i) Further study further on why the Korean process received such a poor evaluation is necessary. There were defects in the way they carried out the process but it would also be interesting to see whether strategic planning needs to be adapted for situations which are so complex, dynamic and pressurised. Ironically it was the Region most in need of planning but where planning seemed to be most difficult. Thomas [1988] quotes studies by Kallaman and Shapiro and Thune and House, "which indicated that planning was easiest in stable environments but improved performance the most in dynamic, complex environments". p. 13. Others like Quinn and Mintzberg would be more sceptical. It would be good to do further research on the process and value of strategic planning in complex, dynamic and pressurised situations.

ii) It would also be valuable to do more research on the questions raised by the Configurational School. [Mintzberg, 1990 b]. For example, what effect does the

configuration of the organization, its environment and the particular stage in its life cycle have on the style of planning process required?

iii] The positive evaluation of their process by the British members raised the question of the importance of vision and the value of one or two visionary projects in creating a sense of unity and purpose in a Region. This could be another topic for useful research.

iv] As yet there has been only a limited amount of research into strategic planning in religious organizations. There are two areas in which more research would be valuable: i] the place of discernment in planning for religious congregations, and ii] the value of strategic planning as a tool for leadership training, renewal and substantial change.

v] More work could be done on how to successfully coordinate processes of strategic planning across so many countries. There is almost no literature on this for religious organizations.

vi] Finally, further research into how to manage cultural change is vital. This seems to be a pressing challenge facing the Society if it is to build on what it has achieved through strategic planning.

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APPENDIX 1

Attitude Survey about the Effectiveness of Strategic Planning in the Missionary Society of St. Columban

1. The aim of this survey is to establish how effective the recent process of strategic planning throughout the Missionary Society of St. Columban has been.
2. If the survey is to be helpful, it is important that you answer each question as thoughtfully and frankly as possible.
3. You will notice that most questions are answered according to a 5 point scale ranging from "Strongly Disagree" to "Strongly Agree". The purpose of providing scope for a range of answers, from the most negative to the most positive, is to avoid influencing your answer. There are no right or wrong answers. The important thing is that you answer the questions the way you yourself see things or the way you feel about them.
4. As the answers to the questionnaire will be completely confidential, please do not sign your name.
5. The answers you give will be combined with those of others and will be reported for groups of members. It will be impossible to identify individuals.
6. It is vital that each individual complete the survey and answer all the questions he can for the results to be valid and useful.
7. Guidelines for answering the questionnaire are given at appropriate places throughout the questionnaire.

Thank you for your time and cooperation.

Strategic Planning in the Missionary Society of St. Columban

The Assessment & Planning Process

I feel that the process of assessment and planning:

	Strongly Disagree	Disagree	Uncertain	Agree	Strongly Agree
1] Has given the Region a clearer sense of direction.	1	2	3	4	5
2] Has given the Region a more unified sense of direction.	1	2	3	4	5
3] Has provided us with a better idea of the missionary needs of the local church.	1	2	3	4	5
4] Has enabled us to make a thorough assessment of our present apostolates.	1	2	3	4	5
5] Has made us more realistic about our personnel resources.	1	2	3	4	5
6] Has enabled us to make the necessary cutbacks	1	2	3	4	5
7] Has enabled us to concentrate on the growth areas for mission.	1	2	3	4	5
8] Has made us better prepared to face the future.	1	2	3	4	5

[Please circle one number on each line.]

Regional Plan of Action

	Not at All	A Little	To Some Extent	Quite A Bit	Very Much
9] To what extent are the activities of your Region governed by plans?	1	2	3	4	5

[Please circle one number on the line.]

10] Does your Region have a clear plan of action for the future? Yes 1

[Please circle 1 or 2, whichever is applicable.] No 2

If yes, please answer 11] and 12] below.

	Very Clear	Clear	Average	Unclear	Very Unclear
11] I feel the major objectives of the Regional plan are	1	2	3	4	5

	Strongly Disagree	Disagree	Uncertain	Agree	Strong Agree
12] I believe the broad outline of our Regional plan is correct	1	2	3	4	5

[Please circle one number on each line.]

The Process of Planning

	Strongly Disagree	Disagree	Uncertain	Agree	Strong Agree
13] I believe I understand the process of assessment and planning adequately.	1	2	3	4	5
14] I believe the members were sufficiently involved in the planning process.	1	2	3	4	5
15] I believe the General Council's Guidelines gave an adequate explanation of what was expected.	1	2	3	4	5
16] I believe the Regional Admin- istration gave leadership and direction to the process.	1	2	3	4	5
17] I believe we were helped by a good discernment process.	1	2	3	4	5

[Please circle one number on each line.]

Results

18] Have there been any concrete changes introduced because of the assessment
and planning process?
[Please circle 1 or 2, whichever is applicable.]

Yes 1

No 2

If yes, could you please list the changes

.....
.....
.....

Communication

In my opinion communication:

	Very Bad	Bad	Fair	Good	Very Good
19] Between the members of the Region is	1	2	3	4	5
20] Between Regional sup- eriors and the members is	1	2	3	4	5

21) Between the General Council and the members is	1	2	3	4	5
22) Between Columbans and the local Church is	1	2	3	4	5

[Please circle one number on each line.]

Communication Cont.

	Strongly Disagree	Disagree	Uncertain	Agree	Strongly Agree
23) Inadequate communication between members of the Region has decreased the overall effectiveness of the Society.	1	2	3	4	5
24) The assessment and planning process has improved communication in our Region.	1	2	3	4	5
25) Because of the planning process I have more understanding of the work of other members of the Region.	1	2	3	4	5

[Please circle one number for each line across.]

Participation

	Strongly Disagree	Disagree	Uncertain	Agree	Strongly Agree
26) I believe that members are heard in most important matters.	1	2	3	4	5
27) There are adequate structures for participation in our Region.	1	2	3	4	5
28) The assessment and planning process has helped improve participation in decision making in our Region.	1	2	3	4	5

[Please circle one number on each line across.]

Purpose

29) In your opinion, to what extent is the Society achieving the purpose for which it was founded?

[Please circle one number.]

Not at all	1
A little	2
To some extent	3
Quite a bit	4
Very much	5

30] Do you feel the Society in your Region has a clear unified sense of purpose?
[Please circle one number.]

Yes 1

No 2

Any comment

.....

.....

.....

31] Has the assessment and planning process helped in any way?
[Please circle one number.]

Yes 1

No 2

Any comment

.....

.....

.....

Current Mission of the Society

32] Are the current mission statements of the Society, *Columban Mission Today* & *Becoming More Missionary* [Please circle one number.]

Very meaningful for you 1

Fairly meaningful 2

Only a little meaningful 3

Not at all meaningful 4

33] How would you express the mission of the Society today?

.....

.....

.....

34] Do you feel that your present apostolate is fulfilling the current mission statements of the Society? [Please circle one number.]

Yes 1

No 2

Any comment

.....

.....

.....

Satisfaction

	Strongly Disagree	Disagree	Uncertain	Agree	Strongly Agree
36] I would rather be a member of the Columbans than of most other congregations I know.	1	2	3	4	5

[Please circle one number.]

37] If a young man came to you with a genuine interest in a missionary vocation would you

Discourage him from the whole idea	1
Encourage him to join the Society	2
Encourage him to join another missionary society	3
Encourage him to become a lay missionary	4

[Please circle one number.]

37 cont.] Any comment

.....

.....

.....

My daily work as a missionary:

	Strongly Disagree	Disagree	Uncertain	Agree	Strongly Agree
38] I get a sense of fulfilment from my work.	1	2	3	4	5
39] I feel my work is important for the Region	1	2	3	4	5
40] My work is an effective way of proclaiming the Gospel	1	2	3	4	5
41] My own professional skills are adequate	1	2	3	4	5

[Please circle one number on each line across.]

Leadership

In your opinion does leadership in the Society:

	Strongly Disagree	Disagree	Uncertain	Agree	Strongly Agree
42] Help provide a clear sense of direction to the Society	1	2	3	4	5
43] Plan well for the future	1	2	3	4	5
44] Listen well	1	2	3	4	5
45] Promote a climate of trust, openness and mutual trust	1	2	3	4	5

46] Reach their decisions promptly	1	2	3	4	5
47] Are good at implementing decisions	1	2	3	4	5

[Please circle one number on each line across.]

Change, Innovation and Flexibility

	Strongly Disagree	Disagree	Uncertain	Agree	Strongly Agree
48] The Society encourages people to put forward new ideas	1	2	3	4	5
49] The life-style of the Society is likely to continue in its present form in the foreseeable future	1	2	3	4	5
50] The work of the Society is likely to continue in its present form in the foreseeable future	1	2	3	4	5
51] I am well disposed towards the introduction of changes affecting the work of the Society	1	2	3	4	5
52] I feel the Society has changed too much	1	2	3	4	5

[Please circle one number on each line across.]

Age

53] Which of the following age groups are you in?
[Please circle whichever number applies.]

- | | | | | | |
|----|---------|----|---------|----|-----------|
| 1. | 21 - 30 | 2. | 31 - 40 | 3. | 41 - 50 |
| 4. | 51 - 60 | 5. | 61 - 70 | 6. | 71 & over |

Any Comments

I would be interested in hearing any other comments you may wish to make.

.....

Thank you once again for your cooperation.

APPENDIX 2

The Accompanying Letter

21st March, 1992.

Dear Confrere,

I am writing to ask you to do me a personal favour. I am completing a Masters thesis at Dublin City University. In the thesis I attempt to gauge the effectiveness of the Society's efforts at assessment and planning. While the study is personal, I hope that it will improve my contribution to the General Council and help provide the Society with a more unified sense of direction, improved morale and better leadership training. It may also prove useful to other missionary societies facing similar questions to ourselves.

A crucial part of this thesis will be the results of the enclosed questionnaire. The questionnaire is being sent to a limited number of Columbans in Korea, selected by a chance method. The random nature of the selection will guarantee the accuracy and representativeness of the results, but only if everyone chosen replies. For this reason your reply is extremely important to the success of my study. Lack of an adequate sample would render the thesis and most of my work null and void. Please answer as many questions as you can and as frankly as you can.

It will take only a relatively short time to answer the questions on the enclosed questionnaire and to return it in the stamped addressed envelope.

Your answers will be completely confidential. In fact, unless you chose to sign the questionnaire I will not be able to identify any individual's reply. It will only be used in combination with others to give a composite picture.

When the thesis is completed I will write a short summary of the major conclusions for *Columban Intercom* but I would be happy to provide a longer summary for you should you request it.

Please return the completed questionnaire as soon as possible and no later than the end of April. Thank you for your help.

Peace,

Noel Connolly.