

ADAPTIVE VERSUS STRATEGIC PLANNING: PLANNING FOR RESULTS

By David Horita, PhD

The process of ministry planning has become a key part of most leadership boards or staffs. It is either implicitly or explicitly expected that most high-level leaders will be able to point to a well thought through strategic plan in order to explain the actions they are taking or the outcomes they are pursuing. This article suggests that it is time for a change. While planning will always contribute value within leadership circles it may be time to reconsider the institutionalized nature of traditional strategic planning, embracing a more adaptive approach that helps the entire church to engage fully in the mission to which Christ has called his people.

A Brief History of Strategic Planning

In 1994 Henry Mintzberg wrote an article in the *Harvard Business Review* titled “The Rise and Fall of Strategic Planning.”¹ In his article, Mintzberg referenced how strategic planning arrived on the business scene in the mid-1960s, with the expectation that it would produce “best strategies as well as step-by-step instructions for carrying out these strategies so that the doers... could not get them wrong.”² Since that time, the author argues, it has been repeatedly demonstrated that strategic planning has not lived up to its original promise.

The reality is that strategic planning originated long before the 1960s. It could be argued that Sun Tzu was its originator over 2500 years ago, when he wrote *The Art of War* to teach his followers that strategic thinking was the key to victory in any battle.³ Whether historians agree with that assessment or not, most do agree that strategic planning is a derivative of military campaigns, finding modern roots in the German Schlieffen Plan that followed a linear planning process enabling rapid mobilization, theoretically assuring the swift defeat of France in World War I.⁴ This success, in turn, led to the adoption of strategic planning models by the US military, known as the Colored Plans, which became their primary operations guide in World War II.

Post-World War II, it was not a large transition for people to jump from military applications to business planning. Strategic planning became a mainstay of most large businesses and corporations. Strategic planners became adept at

¹ Henry Mintzberg, “The Rise and Fall of Strategic Planning,” *Harvard Business Review*, Jan-Feb, 1994.

² *Ibid.*

³ Science of Strategy Institute, “The Nine Formulas of Sun Tzu’s *The Art of War*,” <https://scienceofstrategy.org/main/content/nine-formulas> (accessed October 25, 2020).

⁴ Robert Klein, “Adaptive Planning: Not Your Great Grandfather’s Schlieffen Plan,” *Joint Forces Quarterly*, Issue 45, 2nd Quarter, 2007, 84, <https://www.semanticscholar.org/paper/Adaptive-Planning%3A-Not-Your-Great-Grandfather%27s-Klein/1195099a8ff28bac2b60a16ce84c4366418a8bc1> (accessed April, 2015).

predicting the future based on historic trend lines and gathered data, producing clear five-year plans for organizational divisions to enact, based on directives “from the top.”⁵

Concurrently, in the late twentieth century, the Church Growth Movement blossomed within evangelical Christianity. Donald McGavran’s book *Understanding Church Growth* (1970)⁶ initiated a movement that ultimately embraced sociology, statistics, and quantitative analysis in planning to share the gospel within any particular culture. This kind of linear thinking inevitably blurred into the burgeoning field of ministry planning, until many – if not most – churches began developing their own five-year plans, goals, objectives, and tactical steps re-tasked to the purpose of sharing Christ to contemporary culture.

While a valuable perspective, in some ways the Church Growth Movement and the learning derived from it succumbed to the very issues that McGavran sought to address. As Ed Stetzer wrote in *Leadership* magazine in 2012, rather than responding to cultural change, churches began to see church growth as following a set of formulaic principles.⁷ The ubiquitous strategic plans of churches were their good intentioned attempt to codify and communicate these plans in a way that made sense to the leaders and volunteers of a church. And sometimes they worked. But more often than not, they become little more than thick binders covered with dust sitting on the pastor’s shelf. Once a year the board and staff of a church have a retreat to revise and revisit the plan, sure that the time was well spent. Then, it goes back on the shelf, with a brief foray into the contents six months into the new planning cycle by a church leader motivated by a guilt driven feeling of inadequacy.

The Beginnings of Adaptive Planning

Does strategic planning still have a realistically meaningful place in the church boardroom? Yes. However, it needs to be practiced in a different form. Prior to looking at adaptive planning as an alternative, it may be helpful to note that the traditional strategic planning model has inherent weaknesses for the current times. First, it is unwise to continue to think solely in a linear paradigm when the culture is no longer linear.⁸ Today’s world is far more dynamic and rapidly changing than it was fifty years ago. It is unclear that predictions of future directions can be based on directional trending from the past. While we can learn from the past, it is not

⁵ Dana O’Donovan, Dana and Noah Flower, “The Strategic Plan is Dead. Long Live Strategy,” Non-Profit Management, January 10, 2013, 54, https://ssir.org/articles/entry/the_strategic_plan_is_dead_long_live_strategy (accessed April, 2015).

⁶ Donald McGavran, *Understanding Church Growth* (Grand Rapids: Wm. B. Eerdmans Publishing Ltd., 1970).

⁷ Ed Stetzer, “What’s the Deal with the Church Growth Movement?” *Leadership*, October 1, 2012.

⁸ Science of Strategy Institute, “Thinking Outside the Lines: Linear Strategic Planning versus Adaptive Strategic Thinking,” <https://scienceofstrategy.org/main/content/thinking-outside-lines-linear-strategic-planning-versus-adaptive-strategic-thinking> (accessed April 2015).

obvious that it is a clear determiner of the future. Currently, the world is nine months into a COVID-19 pandemic that is altering what churches are doing, and how they do it. Many believe there will never be a wholesale return to “church as usual.” COVID is indisputable proof that however good a church’s strategic plan may be, there are elements outside its control and capacity to foretell.

Second, traditional strategic planning is inherently institutional. It creates strategies and tactics in a way that naturally inhibits innovation. To put it another way, it produces managers throughout the system rather than strategists. As stated by Mintzberg in his Harvard Business review article, “Systems have never been able to reproduce the synthesis created by the genius entrepreneur or even the ordinary competent strategist, and they likely never will.”⁹ In a world changes at exponentially increasing speed, innovation is more important than it has ever been. For example, a church recently spent unbudgeted money in order to upgrade their sound system to a new digital system. Why? Because the quality of their on-line sound was unacceptable if they were to effectively produce on-line church services as the time frame for COVID continues to stretch longer. This example is simply the application of broadly accepted technological innovation. It does not come close to the level of innovation required by people engaging the diversity of contemporary culture with the gospel.

The inadequacy of strategic planning is not new. As early as 1914, the German army strategists realized that there was a critical flaw with the Schlieffen Plan: once initiated, it couldn’t be stopped. Any attempt to do so would eliminate its big advantage of rapidly mobilizing before France and Russia could respond. German General Ritter is quoted as saying “The outbreak of War in 1914 is the most tragic example of government’s helpless dependence on the planning of strategists that history has ever seen.”¹⁰ Likewise, in December 2005, US Secretary of Defense Donald Rumsfeld approved radical change within the military towards adaptive planning, recognizing that the changing world demanded a new approach in which the “the accelerating pace and complexity of... operations require... the ability to respond quickly to new threats and challenges.”¹¹

It is important to acknowledge that the church is not the military. Nor is the church the corporate world or even simply another non-profit. To repeat: the church is not the military. Yet the church has adopted the methodology of strategic planning. If traditional strategic planning was too institutional for either the German or American army decades ago, perhaps that is a hint for the church.

Whenever the church of Jesus Christ has become institutionalized, it has become ineffective. While the church has institutional attributes that benefit from good planning, it is far more than that. Ecclesiology text books stress that the church

⁹ Mintzberg, “The Rise and Fall of Strategic Planning.”

¹⁰ Quoted in Robert Klein, “Adaptive Planning: Not Your Great Grandfather’s Schlieffen Plan,” 85.

¹¹ Ibid.

is more organism than organization. Therefore, the church needs greater flexibility to meet emerging needs, an ability to express its unique vision through gifted people, a capacity to missionally adapt to micro-cultures and, most significantly, a willingness to respond to the leading of the Spirit of God in the achieving of his mission.

Adaptive Planning in the Church

Inherent to the idea of adaptive planning is that it is not a formula. That it adapts seems clear, but often is less obvious in practice due to human tendencies away from change and towards stability. Churches need to learn the lesson of the collapsed Church Growth Movement: when a church institutionalizes and creates rules regarding change, it eliminates its ability to think differently.

There are two fundamental principles of adaptive planning within the church.

First, apply theology to planning. Assume that God is sovereign and, without dependence upon him, planning is nothing more than the result of human thought. As such, it will always lack in the creativity, potential, and power that is available when a church joins God in his work - rather than simply following its own mapped out path to success. Bring the planners, the plan, and the church to God in prayer, and then take the time to listen. If the church is doing what God asks in the way he asks, the outcome may not always be what was anticipated but it will always be what God desires.

Recently Carey Nieuwhof highlighted on his blog shocking statistics from The Unstuck Group report and Barna research on how churches are engaging with digital ministries through the COVID pandemic.¹² According to the statistics, only 41% of Gen Z people and 42% of Millennials prefer or plan to return to primarily in-person worship. This means that a majority may not return. There is no detailed five-year plan that could have envisioned a disaster changing the weekly rhythms of church around the world. It is a reminder that a church's confidence and dependence is on God and his guidance. A church's confidence and dependence cannot be simply on its leaders and their planning capacity.

The second fundamental principle of adaptive planning is to think in terms of a compass rather than a map. First, the church knows what its unique God-directed vision is. Second, rather than looking at a five-year plan, SWOT analysis, or tactical stages, the church should check its compass to ensure it is heading in the right direction and choose the best next step. The church will review the bigger topography now and then to ensure it is not lost, but mostly it is choosing a road, path, or waterway in the moment. It is helpful to use some of the tools of the traditional planning methodology in order to have a clear picture of where the church is. But the church should not allow the processing of those tools to mislead it

¹² Carey Niewdorf, Online blog , <http://careyniewdorf.com/3-statistics-that-show-how-quickly-radically-and-permanently-church-is-changing-in-2020>.

into thinking it can predict the future a decade from now.

A map shows when to turn right or left and how far to go before turning. Unfortunately, as many know by unfortunate experience, drivers rarely get to their destination without running into traffic congestion or construction. If they have lived in an area long enough, they know that there are alternative ways to where they want to go, and they intuitively adjust to find the quickest route. Adaptive planning assumes the same approach. The church should know where it is going, check the compass and adjust on the way.

Without expounding on these in any detail, it may be worth noting some of the secondary premises of adaptive planning.

- Adaptive planning assumes that the environment inside and outside the church may change at any time. A simple example would be having a lead pastor resign. While a church may have (but not likely) a succession plan, this still changes the reality it has to deal with.
- Adaptive planning encourages strategic thinking regarding the next steps, based on clearly articulated and explained operating values rather than a detailed long-term plan.
- Adaptive planning frees and supports staff and volunteers in specific ministries to make their own choices regarding next steps, as long as they remain consistent with the church vision and values.
- Adaptive planning operates with continual cycles of monitoring, evaluating, and adjusting as frequently as necessary. This assumes that the church is working at developing an internal culture of trust, vulnerability, safety, and accountability.
- Adaptive planning emphasizes and trains leaders in strategic thinking.

On this list of secondary premises, some of the advantages of adaptive planning for the church become evident. This approach to planning assumes a legitimately congregational church in which believers become not only workers in the ministry, but participants in and owners of the vision, values, and direction of the church. In current North American church culture, “congregational” church terminology often means little more than asking church attenders to volunteer at and fund top-down staff driven tactics derived from the five-year plan. And that is optimistic, believing that most staff keep the strategic plan in mind beyond the first few months of its creation.

If adaptive planning is to work for churches, then leaders must continually be discipling and developing others, teaching them how to apply the church values in real situations with real people. In the short term, making an adaptive plan work is likely time consuming, costly, and possibly painful. But it brings about the church that was intended to be.

Drawbacks and Solutions to Adaptive Planning

The argument for adaptive planning contains a large inconsistency. This article argues that following the military into strategic planning was a mistake for the church. After pointing out that the military recognized the flaws in their linear planning, it recommends that churches consider adaptive planning as an alternative. Unfortunately, that is also what the military seems to have done.

And it gets worse for the recommendation that churches should move from strategic planning to adaptive planning. The military has found that adaptive planning also did not work for them. In “The Downfall of Adaptive Planning,” US Lt. Col. John Price wrote in 2012 that adaptive planning “intended to revolutionize the approach to war planning of the world’s largest bureaucracy – has failed by almost any measure.”¹³

However, Price claims that adaptive planning failed as a result of the military’s own institutional culture. The military planners never grasped the essential fact that what was required was a revolution in strategic thinking rather than strategic planning.

This same danger exists for the churches. They can believe that shifting their planning model will result in new and better outcomes. The strategic plan will no longer sit on the shelf gathering dust bunnies, and the church staff, board, and volunteers will rejoice in the new found adaptive planning approach. This is not likely to happen unless they understand that Lt. Col. John Price’s use of the word “revolution” is equally appropriate for the church. The birth of the New Testament church over 2000 years ago inaugurated a revolutionary approach to the mission of the church, in every way counter to the religious culture of the day. In Romans 12, 1 Corinthians 12, Ephesians 4, and 1 Peter 4, the church was taught to use the gifts of all in a whole church body experience for the cause of the gospel. The church is required to overcome corporate or military style institutionalization of the church and church planning, in order to facilitate ministry at every level.

Adaptive planning has a place in the future of church ministry, but only if churches are willing to make the intentional decision to make all its members part of the process. Otherwise adaptive planning is little more than a revised planning tool. It requires a different way of thinking by church leaders rather than simply a different way of planning. The new way of thinking might include answering the following questions:

- *How will the church expand the base of leadership?* Most reasonably healthy churches talk about leadership development. Adaptive planning would require

¹³ John Price Jr., “The Downfall of Adaptive Planning,” Air & Space Power Journal, March-April 2012, 118, https://www.airuniversity.af.edu/Portals/10/ASPJ/journals/Volume-26_Issue-2/Price.pdf (accessed April, 2015).

them to think about releasing decision making to their leaders rather than viewing them solely as implementers of plans.

- *How will the church develop strategic thinking skills?* Churches would need to develop workshops and training venues in which leaders are taught how to apply vision and values to individual decisions in specific scenarios. Rather than planning what leaders should do, the church would plan to teach leaders how to strategically process ideas and come to decisions.
- *In what ways does the church encourage innovation?* With the pace of change, few things remain the same year to year. Some of these changes require new approaches. So, people can be encouraged to think of these new approaches and to try them.
- *Can the church accept and even celebrate failure?* Alongside innovation comes failure. But with failure comes new and exciting ventures and successes. Rather than being afraid of the cost of failure, the church should be afraid of the cost of never trying something new.
- *Does the church appreciate its mavericks and contrarians?* Mavericks and contrarians are quite annoying, but are necessary. They both initiate new ideas and challenge the old. They plant the seeds of changes the church might need to make.

As church leaders consider the planning cycle of the church, it might be time to revise the way that the church plans. More importantly, it is probably time to review how the church thinks about planning. Most church leaders are not lying awake at night shivering with excitement at the idea of another strategic planning retreat. This seems appropriate, since few church leaders gave their lives to Jesus, committed to a life of discipleship, and grew in our passion for the gospel with the deep hope of one day being part of creating a corporate or military style five-year plan.

However, they did hope to serve Christ in the context of a dynamic and energizing community of believers, communicating the story of salvation into contemporary culture. Adaptive planning is one way in which they can help the church as a whole to move forward in step with the Spirit, together fulfilling the mission of the church.

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