

Enhancing Strategic Planning for High - Performance of Catholic Institutions in Zambia

Jonas Phiri

*National Liturgical and Biblical Coordinator, Zambia Conference of Catholic Bishops,
Catholic Secretariat, Lusaka, Zambia*

Abstract

The Church is a non-profit commonweal and service organization. She exists for the promotion of integral human development. She does this through her institutions of education, health, spiritual - pastoral and social welfare. However, most of these Catholic institutions are managed with insufficient strategic planning. As a result, low performance characterizes them. The focus of this paper is enhancing strategic planning for high - performance of Catholic institutions in Zambia. It underscores the need for strategic planning for efficient and effective management of Catholic institutions and identifies deficient proficiency because of inadequate strategic planning. The study was conducted in seven (7) institutions in Lusaka District and some parts of Central Province. The sample size was 257. There were 252 questionnaires which were administered purposively and randomly to first line, middle and top leadership, and management positions, and 5 in-depth interviews were purposively carried out. The research discovered that Catholic institutions were not proficient because they did not have a clear vision, precise policies and procedures, sufficient financial capacity and did not have the ability to adapt to changing times. Recommendations were made thus, to build capacity of leaders and managers in the areas of management audit, leadership and management development, and strategic management. Theoretically, the results can be generalised to all Catholic institutions in Zambia.

Keywords: *Catholic institutions, management audit, leadership and management development, Strategic planning, strategic management.*

Introduction

The Church has been described, among others, as an institution. Like any other institution, it requires a roadmap, a strategic plan, in order not only to operate well, but also to give direction into the future. This is because every organization must respond constantly to the current trends and their implications for what we do as individuals as well as institutions [1]. Every development or charitable organization wants to survive and prosper. To do so, it must respond and adjust to the social, economic and political environment and the changes therein. Changes in the outside environment occur constantly, even in stable societies. Strategic planning is therefore a necessity in every kind of

organization, be it a nonprofit, a government, community based, political or business institution [2]. Fundamentally, strategic planning concerns itself with what an organization or community should do to improve performance. It can help non-profit organizations, as well as communities or other entities to deal with their changing environments and thus assist them to be more effective [3].

The benefits of strategic planning are: 1) environmental assessment, 2) rational basis for decision-making, 3) improvement of organizational performance, 4) awareness of weaknesses and strengths, capacity for growth, other opportunities and potential threats, 5) promotion of teamwork, learning and

commitment, and 6) as an essential tool for good management and governance [4]. Therefore, strategic planning is very important for Catholic institutions to have direction, apt policies and procedures, improved performance, enhanced competitive advantage, efficient utilization of resources, to achieve objectives and attain set goals.

Literature Review

A strategic plan is a long-term plan for the formulation and implementation of organizational goals in an efficient and effective manner [5]. In 1974 at their meeting in Nairobi on “Planning for the Church in Eastern Africa in the 1980’s,” the Bishops of Eastern Africa noted the need for careful planning at all levels of the Church to promote effectiveness [6]. In 2018 the Congregation for the Institutes of Consecrated Life and Societies of Apostolic Life observed the need for a mind-set of planning, which starts from the spiritual and ecclesial experience and makes real the vision of the future through a strategic plan of action [7].

The Bauleni Street Kids Project Strategic Plan (2012 - 2016) also acknowledged lack of strategic planning as one of the challenges that the institution was facing [8]. In the Bible, Jesus Christ through several of his parables taught the importance of planning ahead (Mt 25: 14-30). Thus, the Church should use the knowledge of strategic planning and management principles to spread the Good News [9].

Moreover, every effective organization plans its future because it recognizes that change is constant and that adaptation to change is essential to its continuing life and fruitfulness [10]. For that reason, Church management needs to consider the benefits of developing a comprehensive strategic plan embracing both corporate level and connecting the plan to parish initiatives [11]. Furthermore, spiritual discernment must accompany strategic planning and decision-making, so that each project is welcomed and accompanied by the Holy Spirit. The Holy Spirit is pushing for the renewal of our

strategies so that the Church optimally accomplishes its task [12].

Methodology

The philosophy underpinning this study is pragmatism. A pragmatic methodology provides the researcher with the opportunity to utilize a wide range of strategies or multiple methods to answer a research question, as well as different forms of data collection and analysis techniques that are envisioned to ably meet the researcher’s needs and purposes to best understand the research questions [13].

Therefore, our research has dimensions of basic research (data collected to enhance knowledge), applied research (focuses on analyzing and solving real-life problems), problem oriented research (conducted to understand the exact nature of a problem to find out relevant solutions), problem solving research (conducted to understand and resolve problems), qualitative research (an inquiry process that helps create in-depth understanding of issues in their natural settings) and a quantitative research (a structured-numerical way of collecting data and analyzing it to draw conclusions).

Sampling and Data Collection

The study was conducted in seven (7) Catholic institutions in Lusaka, and some parts of Central Province. The sample size was 257. There were 252 questionnaires which were administered purposively and randomly to respondents in the first line, middle and top leadership and management positions, and 5 in-depth interviews were carried out on key informants purposively selected. Of the 252 questionnaires, 198 were answered and received back. This represents an overall response rate of 79% and a failure rate of 21%.

Data Analysis

Both quantitative and qualitative data were analyzed using excel and thematic methods respectively. This is because the type of data analyzed was largely numeric information gathered on scales of instruments and text

information recorded and reported during in-depth interviews [14]. As such, there was across database interpretation of statistical results and themes or patterns that emerged from the data [15].

Data analysis was determined by the research objectives and research questions. The presentation of data was done using tables because they are simpler to comprehend.

Results and Discussions of Findings

Strategic Planning in Catholic Institutions

Table 1 shows the responses of participants on the question: 'Does your institution have a strategic plan?' The data indicates that slightly more than half (53.6%) of the respondents were affirmative that Catholic institutions had a strategic plan, while 46.4% had a contrary view.

Table 1. Does your Institution have a Strategic Plan?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	52	20.6	27.8	27.8
	Yes	135	53.6	72.2	100.0
	No response	65	25.8	100.0	-
	Total	252	100.0	-	-

Furthermore, 2 (25%) out of 5 of the key informants said the same. An average of 37.7% (46.4% + 25%) of the participants in the survey said that Catholic institutions did not have a strategic plan. Therefore, many Catholic institutions did not have a strategic plan.

Activities Implemented Based on the Strategic Plan

Table 2 indicates that less than half (35.3%) of the participants were of the view that institutional activities were implemented based on the strategic plan and 64.7% of the respondents had a contrary view.

Table 2. Are the Activities Implemented Based on the Strategic Plan?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	75	29.8	45.7	45.7
	Yes	89	35.3	54.3	100.0
	No response	88	34.9	100.0	-
	Total	252	100.0	-	-

Furthermore, 3 (75%) of the 5 key informants said that the institutions were guided by strategic plans, and 2 (25%) said that they were guided by other means such as annual plans and induction manuals. We can surmise that an average of

44.9% (64.7% + 25%) of the respondents said that Catholic institutions were not guided by a strategic plan. Therefore, almost half of Catholic institutions in Zambia were not guided by a strategic plan.

Table 3. Summation of Findings on Key Research Variables

S.No	Variable Category	Quantitative	Qualitative	Average Percent	Percent Rate
1	Strategic planning	53.6%	75%	64.3%	Above 50%
2	Implementation of strategic plan	35.3%	25%	30.3%	Below 50%
3	Clear vision	57.9%	100%	76.4%	Above 50%
4	Self-financial capacity	47.6%	25%	36.3%	Below 50%

5	Established policies and procedures	40.9%	Not clear	20.5	Below 50%
6	Adaptable to change	55.5%	75%	65.3	Above 50%

Table 3 shows that there was inadequate proficiency in Catholic institutions due to inadequate strategic planning. This led to unclear vision, vague policies and procedures, insufficient financial capacity and inability to adapt to changing times.

Practical Implications

Management audit is a comprehensive assessment of management processes and practices of an organization. It involves the review of managerial aspects such as organizational objectives, policies, procedures, structure, and control systems to ascertain the efficiency of the management over the activities of the firm [16]. Therefore, Catholic institutions need management audit if they are to perform proficiently. Strategic management is the ongoing planning, monitoring, analysis and assessment of all necessities an organization needs to meet its goals and objectives [17]. Through strategic management, Catholic institutions can improve strategic planning and therefore perform adeptly. Leadership and management development is a planned and deliberate process to help leaders and managers become more effective; ensuring that an organization meets its current and future needs for effective leaders and managers [18]. If they are to have the capacity for strategic planning, leaders and managers in Catholic institutions need capacity building in leadership and management development.

Recommendations

To Enhance Strategic Planning for High - Performance of Catholic Institutions in Zambia, there is a need to:

1. Do management audit of all institutions.
2. Build capacity of leaders and managers in strategic management.

3. Implement leadership and management development system.

Conclusion

Strategic planning is a powerful means of positioning an organization within its competitive sphere. The drivers of strategic planning are scarcity of available resources, change and competition in the external environment of an organization. Therefore, management audit, strategic management, and leadership and management development system would address the challenge of strategic planning in Catholic institutions in Zambia and enable them to perform optimally.

Conflict of Interest

Though this was both action research as well as a multiple case study, the author has not declared any conflict of interests.

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