

# **United Methodist Association Organizational Transformation**

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**Prepared by**

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# Organizational Transformation

8:00 AM – 12:00 PM

## Session Outline

- |                      |   |                                 |
|----------------------|---|---------------------------------|
| I.                   | Welcome and Opening Remarks<br>Background and Context <ul style="list-style-type: none"><li>• Ensuring UMA is relevant</li><li>• Primary program/service focus to meet member needs</li><li>• Restructure UMA to align resources – human/financial</li></ul>  | Stephen L. Vinson               |
| II.                  | Review of Session Outline and Objectives <ul style="list-style-type: none"><li>• Define what transformation means for UMA</li><li>• Identify key programs/services for organizational growth</li><li>• Identify actionable steps toward implementation</li><li>• Adopt a time line for implementation</li></ul>     | James N. Raffel                 |
| III.                 | Framework for Design and Group Charge <ul style="list-style-type: none"><li>• Small working groups</li><li>• Key framing questions</li><li>• Group review and consensus</li></ul>   | James N. Raffel                 |
| IV.                  | Breakout Groups – Working Session<br>Leader<br>Recorder<br><br>Framing Questions: <ul style="list-style-type: none"><li>1) What key programs/services are of most value?</li><li>2) My primary reason for maintaining my membership in UMA is?</li><li>3) How would I like to characterize the UMA Brand?</li></ul> | All                             |
| <br><b>BREAK</b><br> |   |                                 |
| V.                   | Group Reports   | All                             |
| VI.                  | Review and Consensus of Leadership  | All Facilitated<br>by J. Raffel |
| VII.                 | Actionable Objectives / Time Line   | All Facilitated<br>by J. Raffel |
| VIII.                | Structure and Assignments   | All Facilitated<br>by J. Raffel |
| IX.                  | Closing Comments  | Stephen L. Vinson               |

# Organizational Transformation

## Definition:

Is defined in an organizational context, as a process of profound organization-wide changes, such as restructuring operations, introducing new technologies, processes, services or products, implementing new programs, re-engineering, etc.

Unlike 'turnaround' (which implies incremental progress on the same plane) transformation implies a basic change of character and structure.

## Common Drivers of Transformation:

- To regain program or service quality
- A response to failure
- The ambition to increase competency
- The requirement of improved management and work processes

## Trends:

- Heightened concerns about the effectiveness of traditional governmental and charitable approaches to meeting societal needs
- A search for more innovative solutions that lead to sustainable outcomes
- Prevailing trends in the economy, funding, and people
- Evolving community issues and program/service opportunities
- A parallel shift toward outcomes-based rather than needs-based approaches of funding on the part of private philanthropies

## Four Stages in the Transformational Learning Cycle:

- 1) Recognizing a significant problem;
- 2) Confronting it intensely;
- 3) Finding a solution; and
- 4) Integrating a new perspective and a new set of assumptions.

## Requirements for Successful Organizational Transformation:

- 1.) Creating a Vision  
Leaders must articulate a clear vision that describes what the mission advancement effort is striving to accomplish. The vision should clearly depict how its achievement will improve the organization's effectiveness. (Impact and benefits)
- 2.) Motivating Change  
This phase includes creating a readiness to change and developing approaches to overcome resistance to change. Leaders must widely communicate the need for mission advancement and how the change can be accomplished successfully.
- 3.) Developing Political Support  
Matters of power and politics are critically important to recognize and manage during transformational activities. To be successful, the transformation effort must recruit the support of all key players, i.e., lay leaders, clergy, stakeholders, and donors.

#### 4.) Managing the Transformation Process

This phase should be seen as the implementation of the mission advancement effort and its related action plan(s).

#### 5.) Sustaining Momentum

The most difficult phase in managing mission advancement is when leaders work to sustain the momentum of the implementation and adjustment of plans. Those participating in the transformation effort often require ongoing support.

### **Organizational Survey:**

The process of evaluating and analyzing an organization's structure and other major components to determine whether they are suitably meeting the organization's current and future needs.

- What is the assessment of the external environment?
- How well does the organization understand the existing constituent markets?
- What is the best way to grow annual program support from public and private sources?

### **Organizational Design:**

The process of establishing and arranging the elements of an organization's structure.

- What are the current obstacles? (Staffing structure, policies and practices, plan, and financial model)
- Are the short-term and long-term objectives of the organization reasonably balanced?
- Can the strategy be broken down into doable initiatives? (Short-and long-term goals)

### **Organizational Profile:**

An organizational profile is a depiction of the staffing pattern.

- Can the organization execute the strategy? (The required human, technical, and financial resources)
- What are the milestones for executing the plan? (Growth in realistic targets)

### **Organizational Elements to be Successfully Addressed:**

*Culture* – shaping the organizational culture necessary to address the challenges required of change to enable organizational leaders and staff to embrace and learn from the required change.

*Overcoming Silos* – continuing to move from being viewed as individual divisions or departments as their own entity, to *a system mentality more horizontally integrated* to leverage knowledge, best practices, individual skill sets, and joint opportunities across the organization.

*Managing Change* – addressing the challenges inherent in change and the *scope of authority at all levels* within the organization as the organization adapts to new conditions to increase its sources of revenue.

*Incentives* – developing the appropriate rewards for performance or achievement of annual organizational goals and objectives.

*Accountability* – defining the set of activities that each professional must be able to do in order to succeed at their respective function.

*Personnel* – defining the knowledge, skills, behaviors, and attitudes staff members need to acquire to move organizational transformation forward.

**Recognized Obstacles Include:**

- An inability to manage change effectively or to overcome resistance to change
- Trying to execute a strategy that conflicts with the existing operating structure
- Unclear communication of responsibility and/or accountability for execution of decisions or actions
- Lack of ownership of strategy or execution plans among organizational board members and the executive staff
- Lack of understanding of the role of organizational structure and design in the execution process
- Lack of incentives or inappropriate incentives to support the execution of specific short-term and long-term goals and objectives
- Insufficient financial/budget resources to execute the strategy

**The Essential Variable in Successful Organizational Transformation for the Leader:**

Emotional maturity; defined as:

- Seeking enduring change;
- Having the capacity to get outside of the emotional climate of the day;
- Having a willingness to be exposed and to be vulnerable;
- Persistent in the face of resistance and downright rejection; and
- Focused on goal achievement.

## Breakout Groups

Leader: \_\_\_\_\_

Recorder: \_\_\_\_\_

### Framing Questions:

- 1) What key programs/services are of most value to member organizations?
  - One national convention per year with top flight program content/presenters
  - EAGLE Accreditation
  - Executive support – support and networking to connect more deeply with one another
  - Unique aspects and meaning of a faith based approach to caring
  - Best practices RE: program sharing
- 2) My primary reason for maintaining my membership in UMA is?
- 3) How would I like to characterize the UMA brand?







