ACPE Strategic Planning Update

March 2023

Executive Summary

(This two-page Executive Summary is a 2.5-minute read. The appendix that follows is a 9-minute read.)

ACPE is considering a sequenced 'field catalyst' strategy and will soon begin detailed planning.

- The ACPE Strategic Planning Committee has recommended to the ACPE Board an organizational strategy that is reflective of member desires for a strong Association experience that helps shape the field of professional spiritual care:
  - *ACPE will strengthen its network of spiritual care professionals in the near-term with a longer-term strategy to engage the network of members in increasing the value of professional spiritual care to individuals and families in need of support, institutions providing support, and potential spiritual care professionals.*

Why It Matters: Strategic clarity will enable ACPE to make immediate and longer-term decisions about membership engagement, programs and operations, staffing, governance, fundraising, and collaborations in ways that are aligned with the Association's purpose, desired impact, values, and resources.

- ACPE has put many important decisions (including hiring) on hold over the past several years while awaiting direction from the canceled merger with APC and the current strategic planning process. While detailed planning has not yet begun, approval of this overall strategy can provide clarity to inform how ACPE addresses these pending decisions.

How We Got Here: As the Strategic Planning Committee and Board tried to answer the strategic question *How can ACPE best advance the quality of professional spiritual care?* the group came to realize that a long-standing tension needed to be addressed.

- As far back as the late 1960s, ACPE leaders have wrestled with whether it was an "Association of Pastoral Educators" or an "Association for Pastoral Education." In other words, how much of ACPE's effort should be spent inwardly on the membership experience versus outwardly on advancing the field? Without a clear answer members have interpreted the purpose as they saw fit. This has at times led to dissatisfaction with leadership decisions that prioritized an opposing view of ACPE's purpose than a member held. Member feedback gathered in the early stages of the strategic planning process demonstrated this tension.
- The Strategic Planning Committee and Board recognized that this is a false choice: ACPE is uniquely positioned to strengthen the field of professional spiritual care but must first establish itself as a vibrant membership association.

- The recommended strategy is to first focus on providing high personal and professional value to its members, but with a long-term goal of applying ACPE's strengths toward increasing the value of professional spiritual care to non-members, including people and families seeking support in times of need, institutions housing spiritual care professionals, and people considering a career in professional spiritual care.
- This strategy will build upon the organizational strengths members highlighted: assessment, education, training, and certification.
- Successful implementation of this strategy will help bring about ACPE's vision of a world where everyone has access to quality, life-enhancing spiritual care.

Yes, but: This "both/and" approach means that any internal member engagement, governance, organizational structure, or staffing decisions must be made with a goal of preparing ACPE for a field-leadership role. Choices that may benefit members in the short-term but fail to set ACPE up for long-term impact should be rejected in favor of choices that both benefit members and create the conditions for long-term impact.

What's Next: The Board will vote on whether to adopt the strategy.

What Does This Mean for You? We are at the midpoint of the process, with many questions about what it will look like to set this strategy in motion still unanswered.

- Once a strategy is adopted, the Board, volunteer leaders, and staff will develop a detailed rollout plan. Such a plan will include details about which initiatives will be prioritized, the sequence and timing in which they will be rolled out, what resources are needed, who will be involved, how ACPE's values and culture will be embedded, and how progress will be monitored.
- The rollout planning team will likely connect with members at various points in the planning process for feedback.

Go Deeper: The remainder of this document describes the strategic planning approach, as well as the goals, milestones, and outputs of each phase of the strategic planning project.

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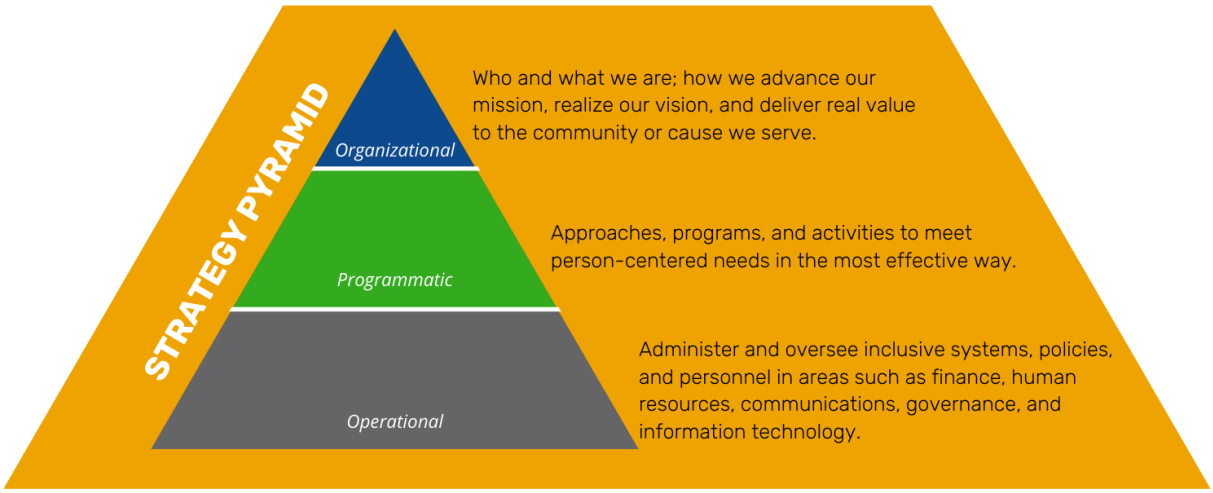
Strategic Planning Approach

Definitions

- **Strategy:** A coordinated set of actions aimed at creating or sustaining a differentiating strength in achieving the nonprofit's mission. *How will we focus and align our efforts in the current environment?*
- **Strategic Planning:** How an organization operationalizes its strategy. *What are the actions, milestones, and resources that will advance our strategy?*
- **Desired Impact:** The inspirational, long-term impact that is sought by the organization, often expressed as a vision statement. *What do we want the world to look like?*
- **Organizational Purpose:** The organization's' reason for being, often expressed as a mission statement. *What is the contribution our organization will make toward our desired impact?*
- **Levels of Strategy:** There are three levels of organizational functioning: organizational, programmatic, and operational. Each of which requires a different type of strategy. A clear organizational strategy helps inform programmatic strategy. The programmatic strategy then informs the operational structures and resources needed for achieving impact through those programs.



Guiding Principles

The Right Questions + Relevant Information + Clear Decision Criteria = Good Decisions

- **Strategy is not planning**. Strategy comes first. Planning brings the chosen strategy to fruition by aligning and coordinating programmatic and operational activities in support of the strategy.
- Strategy development is most effective, timely, and relevant when **a range of perspectives are engaged in the process**. While executive staff and board leaders are often tasked with developing strategy, leadership and expertise exists throughout an organization's staff and community stakeholder circles, regardless of formal hierarchical structures.
- While strategy may describe medium- and long-term goals — subject to change as needed — **the best plans benefit from ongoing refinement** as new information is received.
- **Effective decision-making is rooted in transparent criteria** that drive how decisions will be made. By reaching agreement on decision-making criteria, leaders build cohesion and transparency about how and why the organization does what it does. The criteria also help inform decisions of what not to do.
- A primary decision-making criterion is to **do things that leverage or sustain an organization's differentiating strengths** — the "superpowers" that differentiate an organization from others doing similar or overlapping work and which provide value to stakeholders. Such clarity translates into a role for each organization in its field, which makes all players more effective in fulfilling their missions and better partners to colleagues seeking similar goals.
- **This work is best done using a co-creation model**. The consulting team brings expertise in nonprofit and association management and strategic planning and fuses it with ACPE member and staff expertise about the field of professional spiritual care.

ACPE's Strategy Development and Planning Process



Milestones and Deliverables by Project Phase

Phase 1: Understand the Current Moment – *Complete*

The first phase of the process aimed to clarify ACPE's current organizational identity, the landscape in which it operates, the value it brings compared to other players in its field, and the potential impact leaders seek to have. Member input, captured through focus groups and a survey, was instrumental in creating a clear picture of the current state of ACPE and the field as a platform for building a forward-looking strategy.

- The consulting team reviewed notes from the listening sessions held by board members prior to the launch of the strategic planning project
- Consultants conducted 15 focus groups
  - Accreditation Commission
  - Advocacy Committee
  - Anti-Bias Taskforce
  - ACPE Board of Directors
  - Certification Commission
  - Curriculum Committee
  - Finance Committee
  - Foundation Board of Directors
  - Leadership Development Committee
  - International Relations Committee
  - Professional Ethics Commission
  - Professional Well-Being Committee
  - Psychotherapy Commission
  - Research Committee
  - Staff
- A survey was sent to all ACPE members, with 424 members responding

Phase 1 Milestones[1]

- *Clarification of ACPE's purpose for existing*
- *Description of the desired impact leaders want ACPE to have*
- *Understanding of ACPE's current operations structure*
- *Identification of relevant trends and players in ACPE's field*
- *Confirmation of the strengths that differentiate ACPE in its field*

Member input in Phase 1 focused on identifying the strengths and potential of ACPE, rather than ACPE's current shortcomings. This was intentional: a focus on fixing what's currently lacking often leads to less creative and less transformational strategies than a focus on first identifying a future vision and then aligning organizational strengths and resources to build a path toward it.

Members also shared thinking on trends relevant to ACPE.

Strategic Planning Outputs – Phase 1

- **Statement of ACPE's Current Identity (As of Summer 2022)**

	Purpose	▪ Advance professional spiritual care and education
	Desired impact	▪ Everyone has access to quality professional spiritual care that enhances their life
Operational Model	**Primary audiences**	▪ Current and aspiring CPE educators, Spiritually Integrated Psychotherapists, chaplains, and spiritual care leaders in faith communities ▪ Institutions involved in the preparation or employment of clergy and other spiritual care professionals
	Geography served	▪ USA (though, some members may reside outside the US)
	Primary programs / services	▪ Fostering connections between members and with partner organizations ▪ Advocacy and promotion of the profession ▪ Education and training ▪ Standards, certification, and accreditation ▪ Research
	Funding sources	▪ Accreditation memberships and fees (69%) ▪ Membership dues (12.5%) ▪ Educator certification fees (3.6%) ▪ Conference revenue (3.4%) ▪ Other (Grants, dividends, interest, advertising, endowment earnings, etc.)
	Differentiating strengths	▪ High quality assessment, training, certification, and accreditation programs ▪ High quality and effective education standards

[1] Completed milestones are italicized.

- **Trends Relevant to ACPE's Strategic Planning Efforts**
  - Increased rates of anxiety and depression have driven up demand for psychotherapy. At the same time, demand for psychotherapy that integrates religion and spirituality into treatment is high.
  - Spiritually based care in the healthcare field is growing, though some institutions with limited budgets are considering scaling back programs.
  - Increased competition and lack of field-wide professional standards can lead institutional leaders to be unclear on the value of ACPE's Educators and trained providers compared to others doing similar work.
  - Many more healthcare workers (not just their patients) are seeking spiritual care because of the challenges of the COVID-19 pandemic.
  - Spiritual care in the healthcare field is not clearly defined and does not have consistent practices; many biases and misconceptions in healthcare settings.
  - Retirements and high job mobility are leaving many institutions without a CPE Educator. Open positions often provide a salary or insurance reimbursement rate that is too low to entice talent.
  - Access to professional education may be limited or cost-prohibitive for underrepresented communities or identities.
  - Limited paths for professional development exist within chaplaincy.
  - Psychotherapist state licensing has little standardization or reciprocity between states. Some efforts to improve coordination may narrow the pathway to licensure and threaten the viability of seminary-based training programs.
  - Department of Education changes may make keeping the recognition as an accrediting organization difficult.
  - Healthcare facilities are merging, leading to expansion or contraction of programs.
  - Funding can be difficult to secure for spiritual care programs that address all faith traditions (including those who self-describe as not having a faith).
  - The proportion of the US population that self-describes as religious is decreasing, yet many still seek meaning and support in their moments of need.
  - Members are increasingly demanding equity-centered structures and experiences.
  - Members have had limited opportunities for connection and engagement over the past few years.
  - Market volatility has caused large swings in the ACPE Foundation account balances.

Phase 2: Develop and Approve Strategy – *In Progress*

We are currently in the second phase, focused on identifying ACPE's strategic direction. We first refined the set of decision-making criteria (originally shared in the Phase 1 survey for member input) to ensure ACPE leaders account for what is most important to its members in choosing a strategic direction.

We clarified the most strategic question facing ACPE: *How can ACPE best advance the quality of professional spiritual care?* The answer to this question will be ACPE's strategy and provide direction for all ACPE's operations.

Association Identity Tension

While there was agreement among the Board and Strategic Planning Committee that ACPE's purpose is to advance professional spiritual care and education, a tension was soon named.

- Some members view ACPE as primarily existing to advance the field of professional spiritual care. This 'field catalyst' focus could include engagement, education, and training of a strong member base; advocacy to demonstrate the value of professional spiritual care services and careers to institutions and the public; collaboration with other organizations to advance the priorities of the field; and research and thought partnership to contribute to quality and innovation in professional spiritual care.
- Other members view ACPE as primarily existing to connect members to one another for personal and professional growth. This 'professional network' focus could include fostering connections between members; elevating ACPE's status as a professional home for current and aspiring members; and providing education, training, and resources for members to effectively practice their craft.

Both views center around a strong, engaged, and supported member base; build upon ACPE's strengths in assessment, education, training, and certification; and can advance ACPE's vision of a world where everyone has access to quality, life-enhancing spiritual care. However, a choice between these paths would lead to different programmatic, structural, and operational decisions.

See the following table for examples of how the choice of strategy might influence ACPE operations.

Potential Operational Implications of ACPE's Choice of Focus

Operational Categories	Professional Network Focus	Field Catalyst Focus
Overall Strategy	▪ Establish ACPE as the preferred association for spiritual care professionals, focusing internally on providing high personal and professional value to ACPE members	▪ Strengthen the value of professional spiritual care for institutions and the public, focusing on increasing both demand for and supply of quality professional spiritual care in the United States (whether or not providers of such care are members of ACPE)
Member Education and Training	▪ In response to member needs ▪ Informed by research and input from institutions ▪ Focused on enhancing members' practice and professional advancement	▪ In response to member needs ▪ Informed by research, input from institutions, input from other field organizations, input from individuals receiving or considering professional spiritual care, input by individuals considering careers in professional spiritual care ▪ Focused on enhancing members' practice and professional advancement while equipping members to support field strengthening priorities
Member Engagement	▪ Providing the connections, activities, and leadership opportunities to attract and retain ACPE members to develop a vibrant and strong professional community	▪ Providing the connections, activities, and leadership opportunities to attract and retain ACPE members to develop a vibrant and strong professional community that engages in advocacy, thought partnership, and collaboration with other organizations to advance the field
Organizational Structure and Staffing Priorities	▪ Understand and address the learning, growth, and connection needs of members ▪ Identify and address member experience issues	▪ Understand and address the learning, growth, and connection needs of members ▪ Identify and address member experience issues ▪ Identify, shape, and address field-level issues

Resolving the Tension – the "Both And" Approach

Several ACPE Committee and Board members initially expressed discomfort with framing the strategic direction as a binary choice and strongly advocated for a "both and" approach. However, the groups came to realize that the 'field catalyst' approach is a "both and" approach: early prioritization of strengthening the network to later advance the field.

Based on this feedback, the proposed organizational strategy is: *ACPE will strengthen its network of spiritual care professionals in the near-term with a longer-term strategy to engage the network of members in increasing the value of professional spiritual care to individuals and families in need of support, institutions providing support, and potential spiritual care professionals.*

This direction may be enough to inform some overdue staffing decisions. However, most decisions around programs, structure, staffing, etc. for the greatest potential for success will be made in Phase 3.

Phase 2 Milestones[2]

- *Development of strategic decision-making criteria*
- *Naming of the strategic question and draft potential strategies to answer it*
- *Recommendation by the Strategic Planning Committee of a strategy*
- Status update to members *(March 2023)*
- Board adoption of the strategy *(March* 2023*)*

Strategic Planning Outputs – Phase 2

- **ACPE's Strategic Decision-Making Criteria:**
  A. How will this help us advance ACPE's mission and the impact it seeks to have?
  B. How will this build on ACPE's differentiating strengths or create new ones?
  C. How will this positively advance equity and inclusion and/or avoid creating inequity or exclusion either internally or through our work?
  D. How will this impact ACPE's members, partners, staff, communities, and other stakeholders?
  E. How will this equip ACPE for an ever-changing landscape?
  F. How have data and assumptions informed this potential strategy?
  G. How might this increase or reduce risk for ACPE?
- **ACPE's Strategic Question:** How can ACPE best advance the quality of professional spiritual care?
- **ACPE's Strategy:** ACPE will strengthen its network of spiritual care professionals in the near-term with a longer-term strategy to engage the network of members in increasing the value of professional spiritual care to individuals and families in need of support, institutions providing support, and potential spiritual care professionals.

[2] Completed milestones are italicized.

Phase 3: Roll Out Strategy – *Not Started*

Once the strategy is adopted by the Board, we will begin planning how ACPE will adjust its operations to roll it out. This will include examination of what changes would need to be made by ACPE to create the conditions for success. The detailed planning in Phase 3 will be conducted by teams of volunteers and staff empowered to engage members for input to ensure ACPE has a solid, member-informed platform from which to launch the chosen strategy. The ultimate deliverables will be a strategy roadmap — describing the overall guiding strategy and its rationale — and an implementation plan detailing how ACPE will bring this strategy to fruition and communicate changes to members and other stakeholders.

Phase 3 Milestones

- ACPE volunteers and staff develop detailed transition and implementation plans for programs, services, structures, processes, communications, and staffing *(Tentatively March – June 2023)*
- Begin rollout of strategic plan *(Tentatively June 2023)*

Strategic Planning Outputs – Phase 3

- **ACPE's Strategy Roadmap and Implementation Plan:** TBD