

Moving Strategically

A Planning Workshop for the Reedy River Baptist Association

Presented by

Curtis L. Askew

President and Principal Consultant



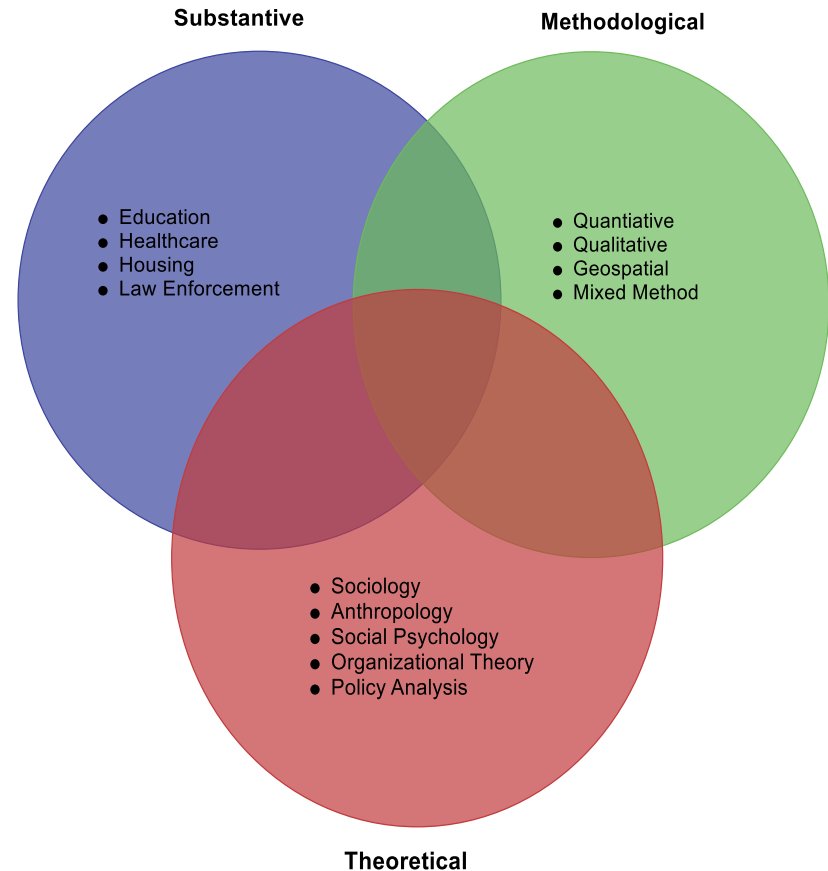
November 16, 2019



A Little Background

- Over 25 years of experience as with data analysis, strategic planning, and evaluation
- Experience with large, medium and small organizations
- Experience with for-profit and non-profit organizations
- Experience with secular and faith-based organizations
- Live in Greenville for 15 years
- Married with two children

Domains of Expertise





Select List of Projects

- Summer Research Fellow, U.S. Army Alternative Staffing Project, RAND Corporation (Santa Monica, CA)
- Lead Analyst and Survey Designer, *Distributed Leadership Project* (Northwestern University, Evanston, IL)
- Research Associate and Assistant Professor, *Strong Communities Initiative* (Clemson, Clemson, SC)
- Instructor and Principal Evaluator, *Emerging Scholars Bridge Program* (Clemson, SC)
- Evaluator, *African American Health Disparities Initiative* (Bay Area, California)
- Analyst, Ten at the Top Upstate Regional Visioning Initiative (Greenville, SC)
- Research Associate and Evaluator, *Broadband Technology Opportunity Program (BTOP)*, Joint Center for Political and Economic Studies (Washington, D.C.)
- Reviewer, Minority Business Affairs Division, U.S. Department Commerce
- Chairman, Rolling Green Village Repositioning (Greenville, SC)



Agenda

1:00-1:05

Welcome and Opening Prayer

Reverend Tony Boyce, Moderator, RRBA

1:05-1:10

Review of the Day

1:10-1:35

Mission Exercise and Discussion

1:35-2:00

Membership Discussion and Exercise

2:00-2:25

Values Discussion and Exercise

2:25-2:50

Data Discussion and Exercise

2:50-2:55

(Presumptive) Next Steps?

2:55-3:00

Closing Remarks/Adjournment

Reverend Tony Boyce, Moderator, RRBA



Objectives of This Session

- Focus the attention of the Association on the role of planning as a way to mitigate risk, particularly those that are legal in nature
- Aid the Association in identifying issue areas that increase its exposure to risk that do not rise to level of legal entanglements but can present an existential threat
 - Mission failure
 - Vision collapse
 - Spiritual irrelevance
- **Facilitate a process whereby the Association begins to:**
 - Identify its core values
 - Articulate its mission more clearly
 - Articulating goals and objectives that supports its vision

EXERCISE #1

How should the phrase “to promote the unity, growth, and outreach its member churches, and to foster whatever else may serve to promote the interest of Christ is the world” in the Association’s mission statement be interpreted?

Questions?

**MEMBERSHIP HAS ITS PRIVILEGES.....
AND (LEGAL) RESPONSIBILITIES**



Care, Loyalty and Obedience: The Duties (and Legal Standards) of Board Participation

- **General guidelines for the operation of non-profits are found in Internal Revenue code**
- **Guidelines for what directors themselves are expected to do as stewards of entities that provided a social good were established as a result of *Stearn v. Lucy Webb Hayes***
 - *Duty of Care*
 - *Duty of Loyalty*
 - *Duty of Obedience*
- **Although related and generally subsumed under the broad heading of “fiduciary responsibility,” each of these duties is distinct**



Duty of Care

- The duty of care requires the full attention to one's duties as a board member, setting aside competing personal or professional interests to protect the assets of the organization. The expectation is that a board member acts reasonably, competently, and prudently when making decisions as a steward of the institution.
- As used here, “assets” can be considered:
 - Financial
 - Reputational
 - Personnel
 - Other tangibles



Duty of Loyalty

- The duty of loyalty requires board members to put the interests of the organization before all others. It prohibits a board member from acting out of self-interest. The board's conflict of interest policy provides guidance on how a conflicted board member can avoid putting personal interests first.



Duty of Obedience

- The duty of obedience refers to the board member's obligation to advance the mission of the organization. It also includes an expectation that board members will act in a manner that is consistent with the mission and goals of the institution. Failure of this duty can result in a loss of public confidence in the institution.

EXERCISE #3

What do you, as a member of the Reedy River Association, get out of being a member?

As a member of the Association, what responsibilities do you have to the Association?

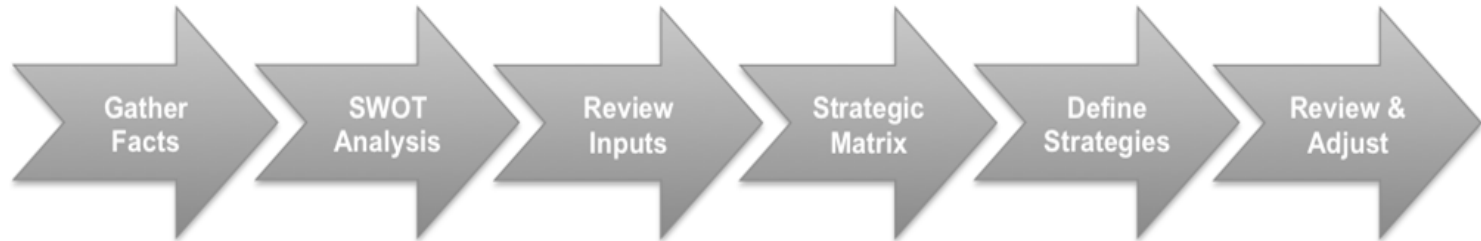
Questions?

THINKING CRITICALLY, ACTING STRATEGICALLY

SOME THOUGHTS ON STRATEGIC PLANNING



Typical Strategic Planning Process



Gather Inputs

- From all Stakeholders
- Customer analysis
- Competitor analysis
- Industry analysis
- Environmental
- Company performance
- Company strategies

SWOT Analysis

- External Analysis
 - Opportunities
 - Threats
- Internal Analysis
 - Strengths
 - Weaknesses
- Strategic Questions
- Strategic Issues

Review Inputs

- All Stakeholders
- Review Inputs
- Review SWOT Analysis
- Define 3-4 key statements

Strategic Matrix

- All Stakeholders
- Define Strategies to address SWOT combinations:
 - Opportunities vs Strengths
 - Opportunities vs Weaknesses
 - Threats vs Strengths
 - Threats vs Weaknesses

Define Strategies

- Objectives
- Key Strategies
- Short and Long Term Goals
- Operational Plans

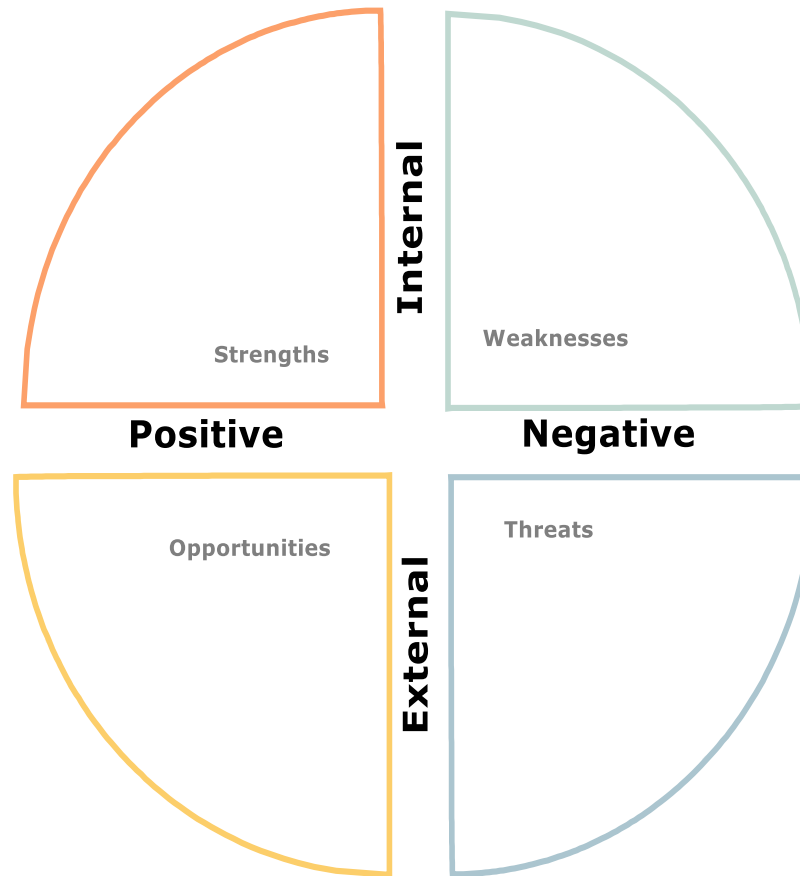
Final Reviews

- All Stakeholders
- Review Strategies
- Review Goals
- Review Plans
- Adjust as necessary



SWOT:

One Approach to Strategic Planning





Other Ways to Do Strategic Planning

- **Goal based**
- **Organic (or self-organizing)**
- **Alignment**
- **Scenario (What-If)**
- **Real-time**



Forgotten Aspects of (Strategic) Planning

- While there are many different approaches to strategic planning, it is important to remember the process is not linear
 - Strategic planning is a dynamic process that takes time
- The reason strategic planning takes time is typically because those who engage in it typically understate or completely overlook the power that beliefs, values, and attitudes have on the planning process
 - **Beliefs** are convictions that may or may not be based on any evidence ; beliefs can be contradictory
 - **Values** are deeply held beliefs that generally form the basis of other beliefs; values shape attitudes
 - **Attitudes** are general predispositions toward a person or thing that reflect to one extent or another our values and beliefs

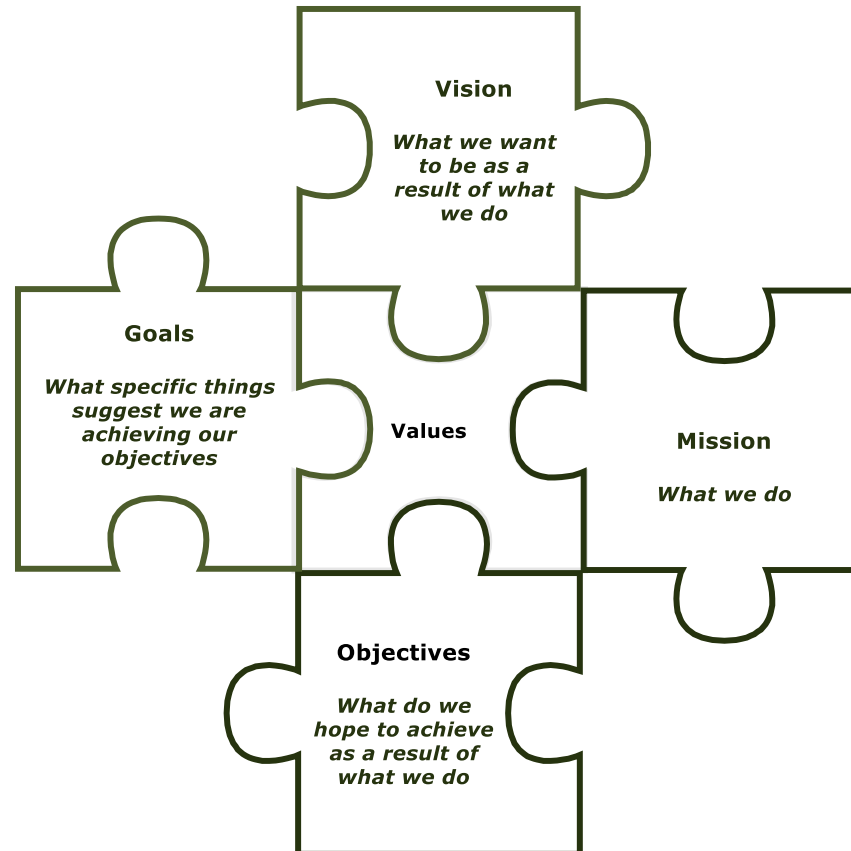


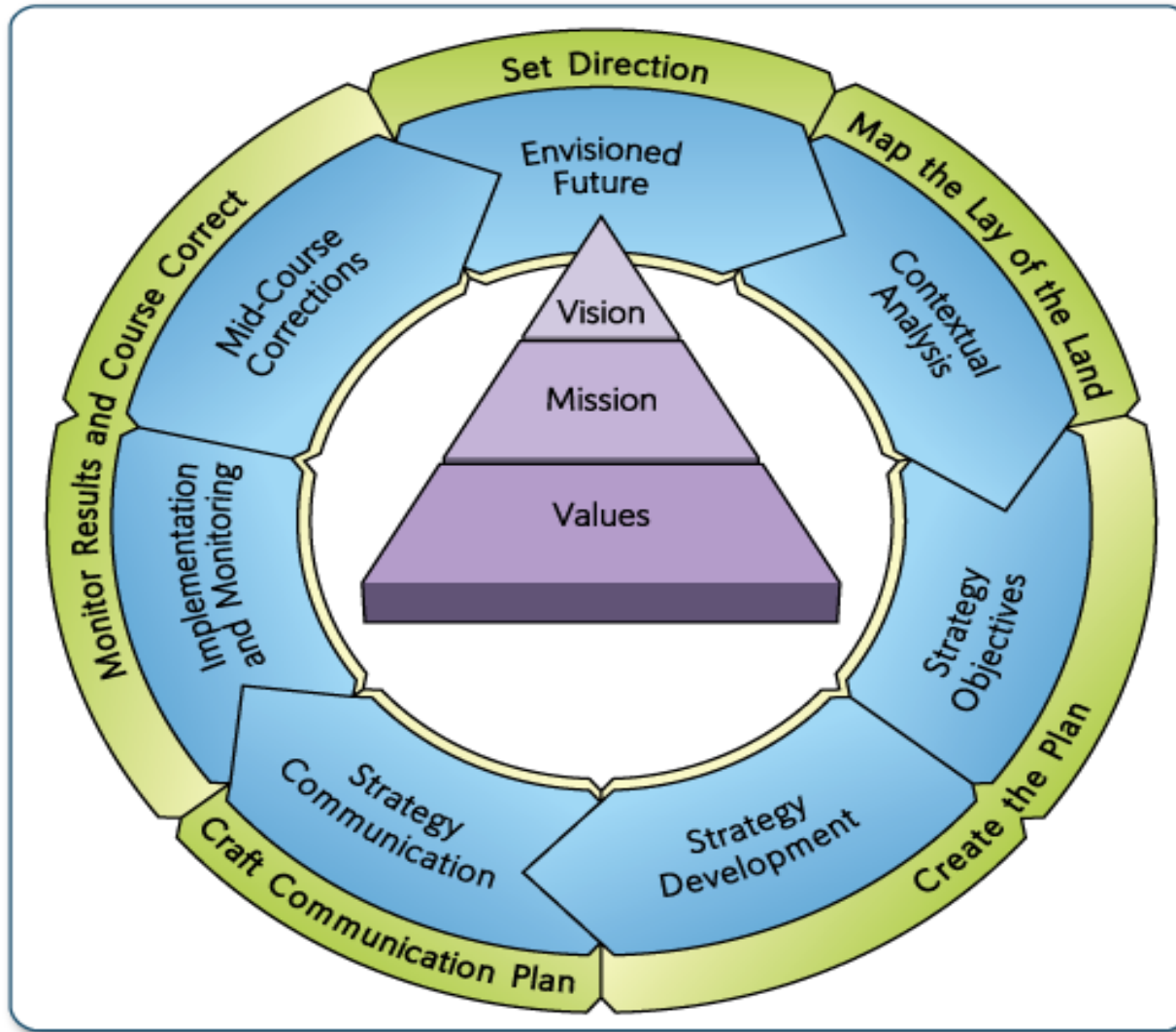
Places Where Values, Beliefs and Attitudes Are Most Often Articulated

- **Core Value Statement**
 - What does the organization wish to project about where it stands?
- **Mission**
 - -Why we do what we do?
- **Goals**
 - -Discrete, measurable, time limited outcomes of what we do?
- **Objectives**
 - -What do we hope to achieve as a result of what we do?
- **Vision**
 - -Where we want to be as a result of what we do?



Values Connect Your Organization





EXERCISE #4

**What do you, as a member of the Association,
what do you value most
about the Association?**

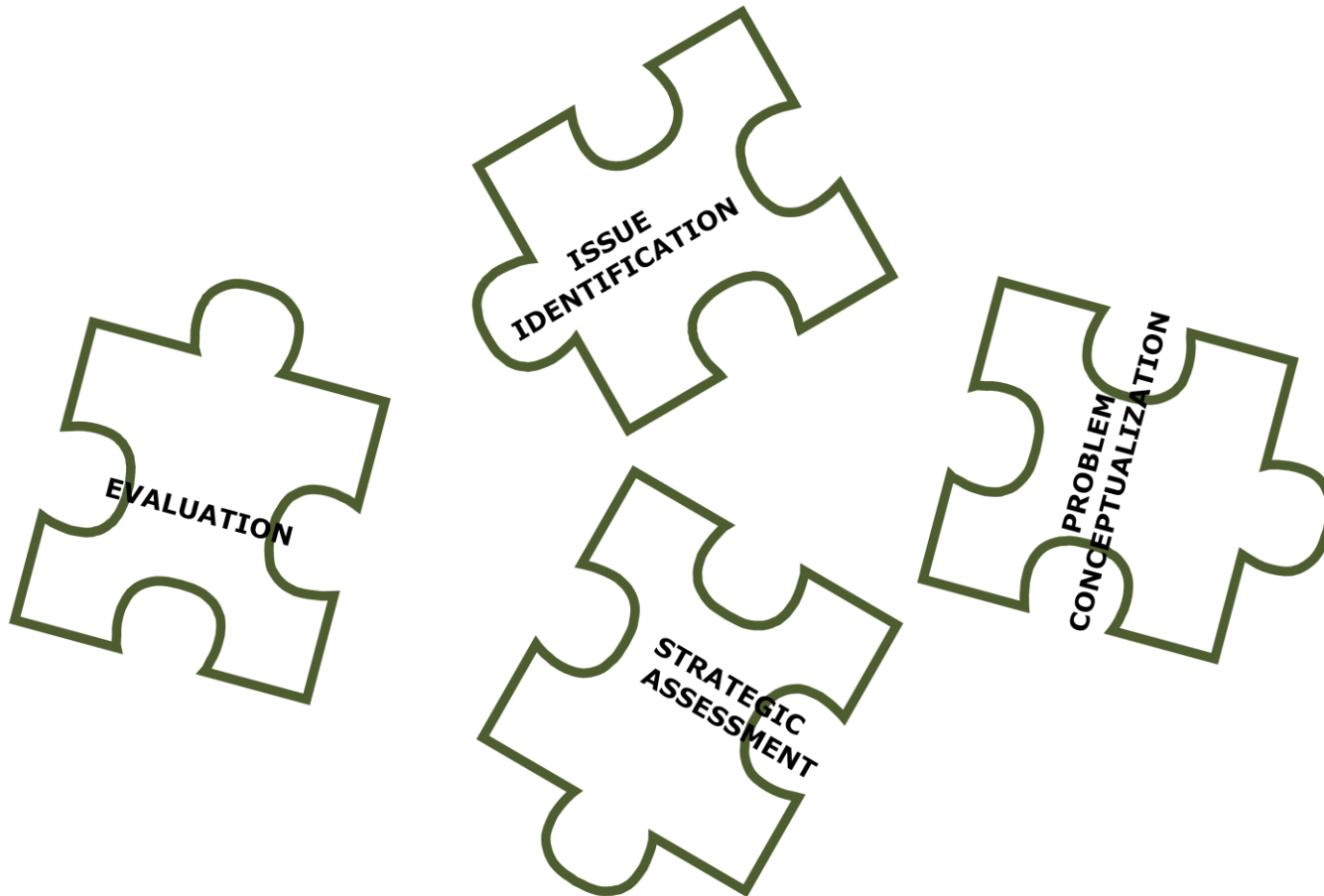
What are the values of the Association?

Questions?

CONCEPTUALIZING YOUR ORGANIZATIONAL SUCCESS

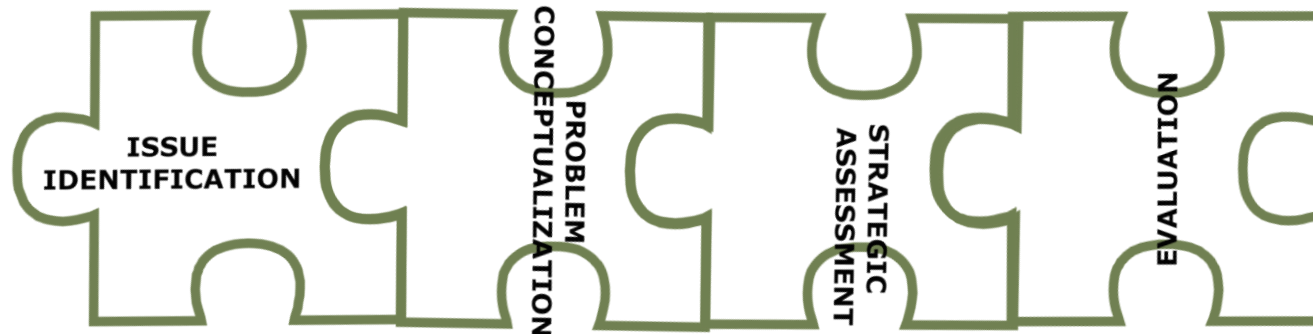


Four Key Elements to Your Organization's Success



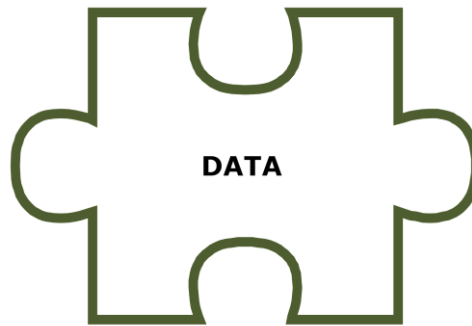


The Key Elements of Success Are Not Linked Together in a Chain





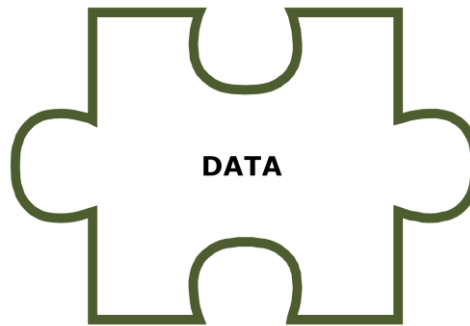
Success Starts with Thinking About Data

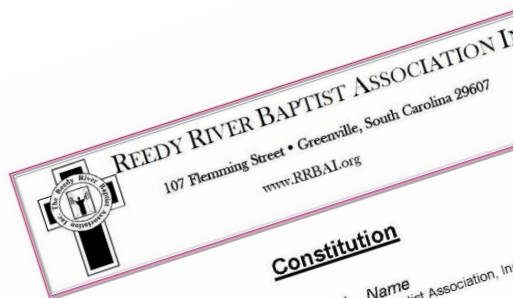




Success Starts with Thinking About Data

Data is often misunderstood as simply being about statistics when, in reality, data is simply a collection of facts that can be used to develop insights about other things you are interested in.





Constitution

Article I – Name

The body shall be known as Reedy River Missionary Baptist Association, Inc.

Article II – Purpose

The purpose of the Association shall be to promote the unity, growth, and member churches, and to foster whatever else may serve to promote the world.

Article III – Membership

The membership shall be composed of only those who of the Reedy River Associational Field.

Section 1: Each church as such, shall be entitled to three delegates for every 50 members over one hundred.

Section 2: Any Baptist church approving the design and objectives of the principles of doctrines and the ordinance of baptism, may upon a vote of the church, be admitted to membership, provided the church has been or is in good standing.

Section 3: The Association may correspond and form a church in any territory where similar views of doctrine and practice are held.

Section 4: The Association holds the right of withdrawal from any church or organization holding similar views of doctrine and practice that abandons its articles, principles, or practices.

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107 Fleming Street • Greenville, SC 29607

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Greenville, SC 29602
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Email: wilbertsimpson11@gmail.com

Sis. Glenda Rhodeman, Secretary
25 Canters Circle
Greenville, SC 29615
864-288-1007
Email: glenda.rhodeman@reedyriverbaptistchurch.org

Church Database Inventory 2017 -2018

CHURCH NAME:	
Address:	
Phone #:	
Email Address:	
Web Address:	
PASTOR'S NAME:	
Address:	
Phone #:	
Email Address:	
Web Address:	
DEACON CHAIRMAN:	
Address:	
Phone #:	
Email Address:	
Web Address:	
BROTHERHOOD PRESIDENT:	
Address:	
Phone #:	
Email Address:	
Web Address:	
WOMEN'S AUX. PRESIDENT:	
Address:	
Phone #:	
Email Address:	
Web Address:	
YOUTH AUX. PRESIDENT:	
Address:	
Phone #:	
Email Address:	
Web Address:	
SUNDAY SCHOOL SUPV.:	
Address:	
Phone #:	
Email Address:	
Web Address:	
USHERS PRESIDENT:	
Address:	
Phone #:	
Email Address:	
Web Address:	
YOUTH AUX. PRESIDENT:	
Address:	
Phone #:	
Email Address:	
Web Address:	

CHURCH DATABASE INVENTORY 2017-2018

REEDY RIVER BAPTIST ASSOCIATION, INC.
107 Fleming Street • Greenville, South Carolina 29607
www.rtbai.org

Date: _____

Name of Ministry: _____

President: _____

Address: _____

Telephone: _____

Email Address: _____

City, State, Zip Code: _____

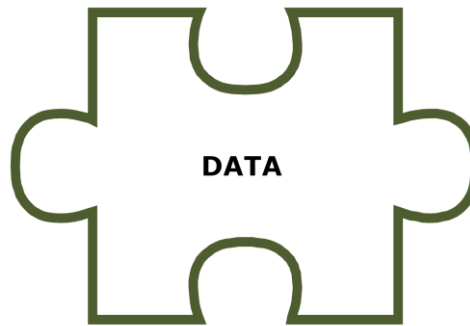
FEES AND ASSESSMENTS
Fiscal Year: September 1, 2017 - August 31, 2018

	AMOUNT ASSESSED	Amounts PAID with this check	BALANCE DUE
Annual Session (Parent Body)	\$1,000.00		
Ministry Fund	Auxiliary's discretion		
Reedy Baptist Learning Center	Auxiliary's discretion		
College	Auxiliary's discretion		
Other	Auxiliary's discretion		
Check #:			
BALANCE DUE:			

www.reedyriverbaptist.org



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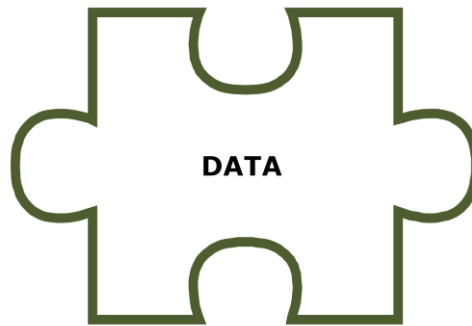
DATA and
INFORMATION are
frequently confused but
they are NOT the same
thing.

INFORMATION is the
RESULT of asking a
question of DATA.



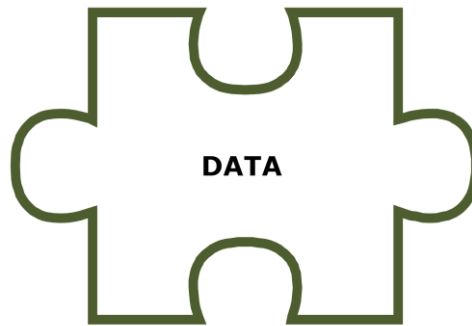
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What internal sources exist?





Success Starts with Thinking About Data

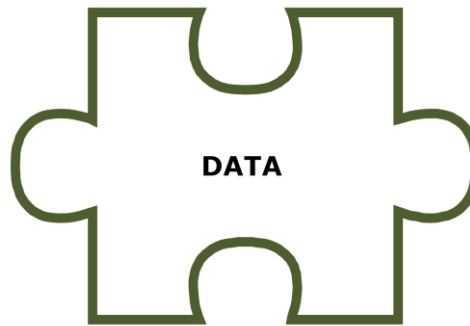


What external sources exist?



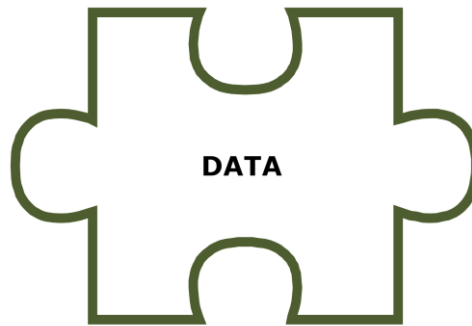
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Does it address the problem?





Success Starts with Thinking About Data

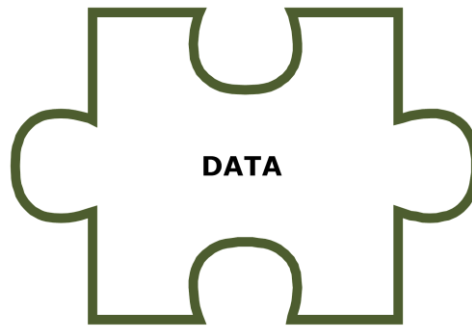


Is it timely is the data?



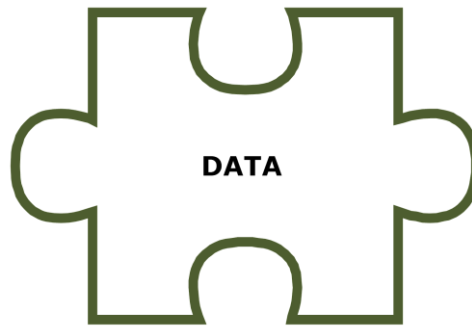
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How is it collected?





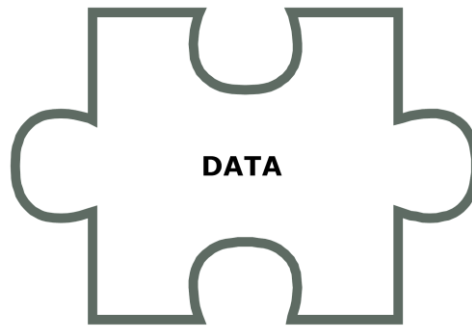
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Should it be qualitative?



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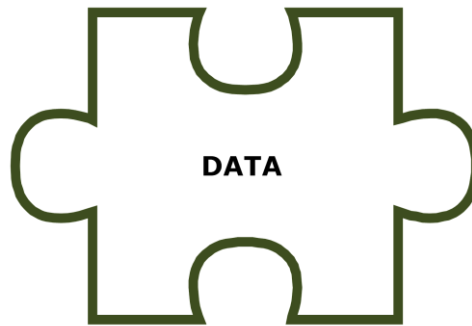


Should it be quantitative?



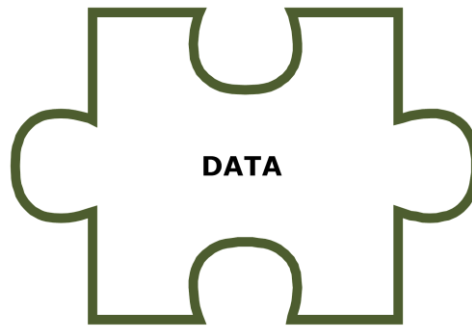
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Should it be mix-mode?





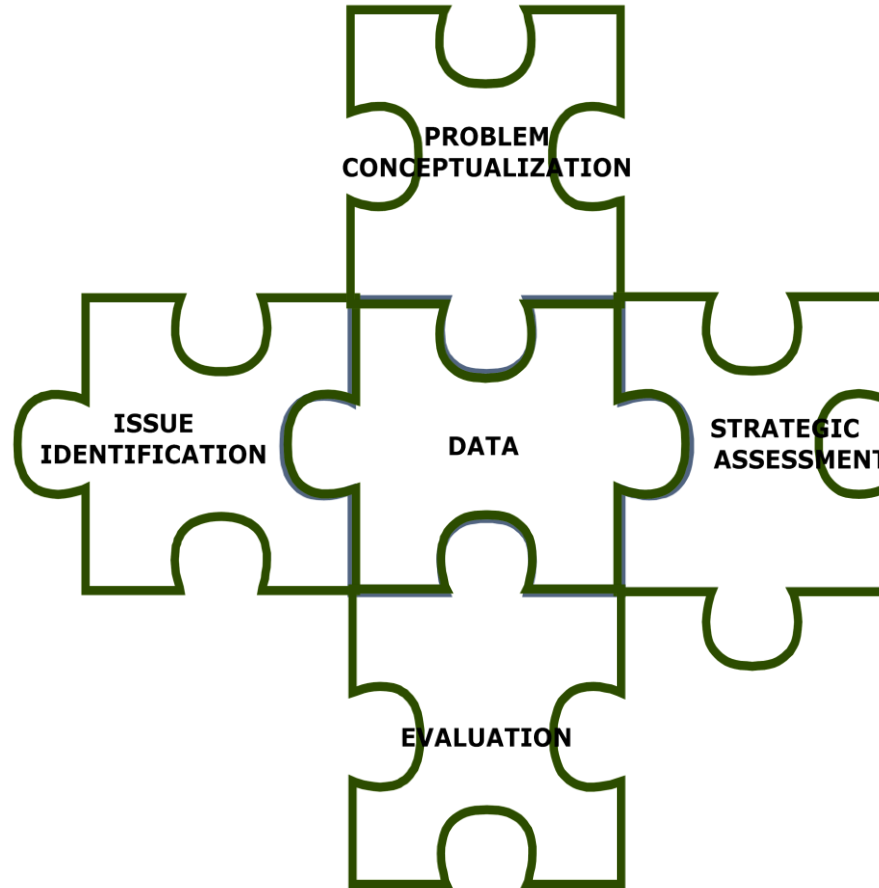
Success Starts with Thinking About Data



Does spatial context matter?



Once you understand the role of data to your success, you can take action



EXERCISE #2

How might the Association leverage data to inform its stated mission?

Questions?



So, what now?

- **Consider whether the Reedy River Baptist Association mission and vision statement require updating and clarification to align the Association with the values of its current membership**
- **Presuming there is consensus about revising the mission and vision statements, create a set of value statements that guide how the operations of the Association (mission) should proceed to the objectives of the Association (vision)**
 - Governance
 - Finance
 - Strategic Planning
- **Review the Association's constitution to align it with the mission and vision**
 - More clearly define your committee structures
 - Outline more clearly what membership requires
 - Provide more detailed explanation of the roles and responsibilities
- **Development of an action plan. AP should include the following:**
 - Objectives
 - Goals
 - A realistic timeline for completion of each item
 - Write it down and then act on it

Questions?



Closing Remarks

Reverend Tony Boyce

Moderator

Reedy River Baptist Association