

THE
DISCIPLESHIP
PLACE

**Boardroom
Transformation**

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Mark's unwavering focus lies in developing a strategic vision that promotes growth and leadership excellence, inspiring others to lead with conviction, deliver results, catalyze resources, and expand their capacity. He is a respected thought leader to clients and colleagues, leveraging his 28 years of professional business experience and deep expertise in sales, marketing, operations, development, executive management, board management, coaching, and mentoring.

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Stop Dealing with Operations - Start Focusing on Strategic Vision and Planning

SESSION OVERVIEW

INTRODUCTION

STAYING STRATEGIC AND FOCUSED

APPLICATION

JOURNALING

MENTORING QUESTIONS

CONCLUSION

TIPS AND TRICKS FOR PREPARING NEW
BOARD MEMBERS

LEARNER OBJECTIVES

At the end of this session, you should:

- Identify what strategic planning is and is not.
- Understand the importance of having a strategic plan.
- Demonstrate an understanding of leaders and board members of their roles in mission, planning, and evaluation.

SCRIPTURAL FOCUS

Numbers 14:1-4 (NIV)

Stop Dealing with Operations - Start Focusing on Strategic Vision and Planning

INTRODUCTION

According to Webster's Dictionary, the word strategic means to implement a strategy. A strategy is defined as "a plan, a method, or maneuvers for obtaining a specific goal or result." So a strategic plan for an organization or ministry is simply a plan to reach a desired goal or result. Unfortunately, far too many organizations never take the time to think about where they want to go and what "getting there" will look like.

Here are a couple of million-dollar questions: Who is responsible for the strategic thinking and planning for the church or ministry? Does it fall on the pastor, executive committee, staff, or board? According to Mills (2022), "A strategic plan is the roadmap for the upcoming year, aligning all stakeholders on your priorities, mission, and objectives" (para. 24). Every organization faces challenges, demands, and opportunities. Strategic planning addresses each of these components and ensures the church is responding and not reacting to the needed changes. "Strategy implies change" (Galvin, 2020).

The success of the organization depends on board members. When boards spend time in the strategic thinking and planning process, it should be an exciting time for both staff and board members. It gives them an opportunity to dream together and share how to achieve that dream: knowing, understanding, and carrying out their roles, responsibilities, and functions.

These functions are fulfilled in a group. It takes a group of board members working together, asking questions, being strategic, engaging in conversations, and being involved in decision-making. The board has a job to do, with a clear set of roles, responsibilities, and functions to fulfill. As DiVirgilio (2020) observes, "Organizations that have a strong, highly-functioning board of directors are more successful overall." Successful boards and organizations utilize an assessment to measure how well they are functioning in their financial, human resources, and governance responsibilities. The assessment helps the organization identify its weaknesses and implement a plan to address and strengthen them. Being transparent and being willing to engage in the assessment process will contribute to organizational effectiveness as well as create an opportunity for the organization to grow and thrive.

Input from the board on strategic planning is imperative since the board is liable for the organization (BoardSource, 198). Having the board engaged in the strategic planning or vision casting process allows the board to know where

the organization is headed. The board is aware of the strengths, weaknesses, and opportunities that exist both internally and externally for the organization and can be prepared to deal with unexpected situations that the organization may face.

Strategic planning moves the organization beyond just letting things happen. It ensures the organization is moving forward with purpose in meeting its mission. The focus of the process is to look at the big-picture goals and needs of the organization rather than just checking items off a task list.

Stahlke (2010) points out that the “Measurement of results is another form of accountability.” He observes that “Most churches measure tactical outputs, not strategic outcomes.” He provides four common measurements of church health:

- Net annual growth in membership
- Average church attendance
- Average giving
- Average Communion attendance

Nevertheless, Stahlke qualifies their value, noting: “While we might be inclined to think that these measure the degree to which members are benefiting from the services of the church, they only obliquely measure what is happening in the hearts and lives of people. Mostly they just measure activity” (15).

STAYING STRATEGIC AND FOCUSED

**NOTES**

Often, in leading a church, faith-based organization, or other organization, when things are going great and the milk and honey are flowing freely, the people are content. When things begin to get a little uncomfortable – a budget shortfall, a transition in staff, or questions from the stakeholders that board members can't easily answer – people look to the leader for answers. Otherwise, they're quick to point and throw blame, complain and grumble, just like the Israelites did with Moses and Aaron. Wise is the leader who stays strategic and reminds the board members of the vision and mission of the organization. Leaders must remain focused, call the team together, and strategize and navigate through the disruptions and conflicts. They lead with a clear purpose, enthusiasm, and continued communication of the vision, keeping the people both inside and outside the organization excited and engaged.

APPLICATION



NOTES

Write a one-page paper that describes how you would like others to perceive the church, ministry, or organization in the future.

JOURNALING



1. What three big goals could transform your church, ministry, or organization's future if you were able to accomplish them?

2. Does the board verify that the organization and staff are still focused on the strategic plan put in place by leadership?

MENTORING DISCUSSION



NOTES

Be prepared to discuss the following with your mentor.

- Commit to reading at least one article, blog, or book about board service. Share your insights and discoveries with your mentor.
- Are you willing to honestly assess if the organization's values are being expressed or are evident in your actions and the board's actions?
- Are you willing to hold yourself, the board, and the organization accountable to exercise and embody its values?

CONCLUSION



NOTES

The board leads the strategic planning process from the perspective of listening and learning from the staff and stakeholders and looks to the senior pastor for insight to ensure the church is offering programs and services that reflect the priorities of the church. It does not have to be a complicated process. Remember, the strategic planning process is not about recasting the vision or mission of the organization or identifying the values of the organization. The strategic planning process is identifying where you are and how you will get from here to there.

TIPS AND TRICKS FOR PREPARING NEW BOARD MEMBERS



NOTES

Welcoming and Initiating New Board Members

[Betterboards.net/governance](https://betterboards.net/governance)

August 16, 2022

If your board is currently seeking new directors or will be soon, there's no time like the present to be proactive and start preparing to welcome and initiate future board members. Below are some quick tips on how to go about it:

1. Have an induction process in place.

This process should involve one-on-one meetings with the chair, CEO, and any other key executives. It should also include a tour of the organization on the ground and the chance to meet staff and observe their work in action. Encourage the newcomer to ask questions at every stage.

2. Assemble an induction pack.

This should include important documents with current information on your organization, its finances, and board policies. These should include strategic plans, financial reports, and recent board papers. David Fishel (2008) says that with this information, "most board members will feel far more confident about the context within which they will be contributing, and about the current issues facing the organisation."

3. Encourage social interaction.

Allow some time for new board members to get to know the rest of the board. Knowing the rest of the board personally can provide extra confidence at the board table. It will also provide newcomers with the chance to become familiar with the personalities and relationships that have a bearing on the board's culture. This could simply be a morning or afternoon tea on either side of a board meeting or event.

4. Assign a mentor to the new board member.

This will provide them with a personal connection they can call on to ask specific questions. Remember that each new board member will have different needs, so the induction process should be flexible and allow the new recruit to ask questions one-on-one.

TIPS AND TRICKS FOR PREPARING NEW BOARD MEMBERS



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5. Provide first-time board members with training.

This might mean access to resources, attending seminars or conferences, or sitting down with the financial advisor or chief financial officer to discuss the accounts in detail. Remember also that board members can benefit from training throughout their careers. Even those who have served for a number of years will appreciate refreshers or exposure to new ideas or practices.

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