

# Template Training Tuesday: Discerning Direction Document



13 April 2021



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# Overview

- 1. Welcome**
- 2. What is a Discerning Direction Document?**
- 3. Why should God's workers use it?**
- 4. How can you adapt it to your organization?**
- 5. What if you used it? (Testimony)**
- 6. Q & A**
- 7. Wrap-up**



# What is a Discerning Direction Document?

It is a one-page plan of faithful activities for a staff member for a fiscal year.

## DISCERNING DIRECTION DOCUMENT (3D)

Annual Dynamic Plan of Faithful Activities for 2019-2020

Gary G. Hoag, PhD – President & CEO



**PURPOSE:** In obedient service to Jesus Christ, Global Trust Partners (GTP) multiplies faithful stewards and mobilizes peer accountability groups to build trust and grow local generous giving to God's work.

**PRESIDENT & CEO:** This full-time position serves God, the board, regional facilitators, and staff by orchestrating the efforts of GTP to accomplish our purpose with integrity to our guiding verse and values and in partnership with our global network.

**PRAYER:** God, give us your perspective on all GTP matters, guide our people (staff, board, regional facilitators), help us build our processes, raise up partners (givers, intercessors, volunteers), supply provision, grant protection, and fill us with peace.

### 1. Disciple Board, Team Members, and Regional Facilitators to build "With You" culture in launch year

- Serve as primary point of contact and accountability with the GTP board to ensure faithful administration
  - ✓ Oversee adherence with state and federal laws, GTP by-laws, articles of incorporation, and Board Policies Manual
  - ✓ Do monthly trip reports, quarterly dashboard for zoom meetings, and annual CEO report at October meeting
- Nurture Team Members through personal interaction and professional collaboration
  - ✓ Zoom 1:1 weekly and message as needed to give support, feedback, and encouragement in real-time
  - ✓ Hold them accountable for faithful activities outlined in dynamic plans updated quarterly and reviewed annually
- Resource Regional Facilitators (RF) to accomplish GTP purpose in their regions
  - ✓ Visit each RF annually, zoom quarterly to disciple each RF through 4 books, and email monthly for prayer
  - ✓ Work with each RF on annual plans and fun approved program plus grants and resources (as needed)

### 2. Deliver Programs to the Receptive (pastors, ministry administrators, accountants, lawyers, and other professionals)

- Conduct global program delivery with VP of Training & Empowerment
  - ✓ Draft policies, procedures, and training materials and other items linked to program collaboratively with VPTE
  - ✓ Interface with RF/PAGA (Peer Accountability Group Administrators) and others to maximize international trips
- Provide 4 programs (teaching, training, teamwork, and toolbox) with VPTE as God opens the doors of opportunity
  - ✓ Teach biblically-integrated content, coach VPTE to teach/facilitate, develop and roll out replicable trainings
  - ✓ Collaborate with RF/PAGA to form new and strengthen existing PAG (Peer Accountability Groups)

### 3. Rally Engagement with Global Network (givers, prospective givers, foundations, organizations, and other friends)

- Orchestrate global engagement efforts with VP of Partnership & Communications
  - ✓ Draft policies, procedures, written documents, and other items linked to engagement collaboratively with VPPC
  - ✓ Interface with people in the Global Network (1:1 and groups) to invite/nurture partnership with us in God's work
- Tell stories of what God is doing, letting our global network know how they can pray and how they can help
  - ✓ Make, on average, one 1:1 call or touch per day to build Global Network of prayer and partnership with us
  - ✓ Draft copy for board dashboard quarterly and Journal Entry as needed (approximately two emails per month)

### 4. Oversee Operations with Strategic Vendors and Volunteers (outsourced administration, technology, and others)

- Orchestrate operations with Global Administrator and steward human/financial resources with CFO & Strategy Catalyst
  - ✓ Collaborate with Global Administrator to serve the needs of the board, staff, RF, and PAGA
  - ✓ Work with CFO & Strategy Catalyst to oversee financial affairs, strategy implementation, and interface with Provisum
- Interface with volunteer CTO and other strategic volunteers (as appropriate)
  - ✓ Meet with CTO bi-monthly to nurture relationship and ensure GTP tech needs are anticipated/addressed
  - ✓ Engage others in Global Network to share resources for budget saving and staff support to aid us as appropriate

### 5. Embody the GTP Values, Grow and Learn

- Personally, these activities will help GTP values flourish in your life
  - ✓ Spend time in the Word and prayer daily (Christian commitment and Biblical teaching)
  - ✓ Attune to God to empower others to make the choice on their journey (listening and empowerment)
  - ✓ Plan work, exercise, diet, fast, and rest weekly for well-being, so my soul has strength from God for doing
- Professionally, these activities will help GTP values spread to others
  - ✓ Zoom with each peer accountability group administrator annually (transparency and accountability standards)
  - ✓ Take monthly trips and respond to inquiries within 48 hours (humble service and partnership)
  - ✓ Discuss 4 books with GTP team to learn application ideas (global diversity and sustained interdependence)

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# What is a Discerning Direction Document?

**It has seven parts:**

- 1. Name, title, and fiscal year**
- 2. The purpose of organization**
- 3. The purpose of your role**
- 4. A prayer related to your role**
- 5. Strategic areas of work (numbered)**
- 6. Goals under each area (dot points)**
- 7. Faithful activities (check marks)**

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# What is a Discerning Direction Document?

## 5. STRATEGIC AREAS OF WORK

- **Numbered items that start with verbs**
- **Mapped out by CEO with the board input**
- **Similar year over year and not measurable**
- **Gives focus to work and annual review**
- **They should link to the board, the staff, and volunteers**



# What is a Discerning Direction Document?

## 6. GOALS

- **Dot points that start with verbs**
- **Sub-categories of strategic work the staff can control (not results the staff cannot control)**
- **Are not measurable but they represent the areas in which faithful measurable work will be done**
- **Tend to change year over year**
- **Answer the question: "What must be done to accomplish this strategic initiative?"**



# What is a Discerning Direction Document?

## 7. FAITHFUL ACTIVITIES

- **Measurable items**
- **Specific work the staff will do to try to reach goals**
- **Marked as daily, weekly, monthly, quarterly, annual, or as one-off tasks that can be measured**
- **Helps determine what tasks to stop (unfruitful) and what tasks to continue (fruitful)**
- **Prepares you for your annual review: Did you do the faithful work in these strategic areas?**





# Why should God's workers use it?

Faithfulness is the only pathway to fruitfulness.

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# Why should God's workers use it?

**Consider four more reasons:**

- 1. Allows God and positions the board to chart the course as it is discerned by prayer and discussion**
  - 2. Maps out work for accountability and evaluation**
  - 3. Helps with staff development and board education (e.g., Egypt)**
  - 4. Models faithful service to staff (for their 3D docs)**
- To be fruitful, map what faithful work looks like.**



# How can you adapt it to your organization?

- 1. Download and study the template.**
- 2. Pray about the strategic areas of work for the year.**
- 3. Map related goals and faithful activities.**
- 4. Share 3D with your board, direct reports, and peers for input and alignment.**
- 5. Revisit it quarterly and for annual review.**



# What if you used the Discerning Direction Document?

What outcomes can  
your church or  
ministry anticipate?



**GREGG CAPIN**  
GTP Board Member



# Questions & Answers



**ERENY MONIR**  
GTP VP of Training &  
Empowerment



**RUTHIE CRISTOBAL**  
GTP VP of Partnership  
& Communications



**GREGG CAPIN**  
GTP Board Member

# Next Template Training Tuesday...

**20 April 2021**  
**12 noon GMT**

**SPENDING PLAN**  
**(BUDGET)**



**GARY HOAG**



**MATTHEW GADSDEN**



**MARK WHITSITT**





**Email inquiries and send impact stories to [mail@gtp.org](mailto:mail@gtp.org).**



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