

RESEARCH REPORT

A PUBLICATION OF RESEARCH, HOME MISSION BOARD, SBC

Evaluation of Cooperative Agreements Between the Home Mission Board and State Conventions

Phillip B. Jones

***Evaluation of Cooperative Agreements Between
the Home Mission Board and State Conventions***

Prepared for the Study Group for Cooperative Agreements,
Implementation Task Force for the North American Mission Board, SBC

Phillip B. Jones

May 1, 1997

Home Mission Board

Ernest Kelley, Interim President

Research Division

Phil Jones, Director

Marilynn Kelly, administrative secretary/editorial assistant
770/410-6576

Program Research Department

Steve Whitten, Director

Bob Rennier, Associate Director

Pam Mitchell, secretary/research assistant
770/410-6583

Planning and Services Research Department

Richie Stanley, Director

Connie Anthony, secretary/research assistant

Carolyn Hillmon, research assistant/graphics

Paulette Villarreal, research assistant/programmer analyst
770/410-6581

PREFACE

This is a lengthy report. However, the narrative section is only seven pages long; thus, it serves as a summary of all the detailed information provided by survey respondents. All survey responses, some quite lengthy, were read and reread. The narrative attempts to identify the major recurring themes and ideas, but does not include all the unique information provided by participants. Note that the identification of themes or major ideas given in response to open-ended questions required summarization and interpretation by the author of this report. Therefore, twelve appendices have been included that preserve the richness and diversity of the near verbatim responses of survey participants. The appendices can be used to verify the accuracy of the author's interpretations and conclusions.

ACKNOWLEDGMENT

A special work of thanks goes to Marilyn Kelly who has been instrumental in the implementation of this survey and report. Marilyn Kelly, administrative secretary in the Research Division of the Home Mission Board (HMB), handled all correspondence related to the survey, monitored response, keyed all data, and edited, styled, and pulled together the final report.

TABLE OF CONTENTS

Introduction	1
Methodology	1
Response Rates	1
Effectiveness of Cooperative Agreements	2
Strengths of Cooperative Agreements	2
Weaknesses of Cooperative Agreements	3
Suggestions for Making Cooperative Agreements More Effective	4
Evaluation	4
Role of the Regional Coordinator	5
Effectiveness in Targeting Strategic Needs	6
Alternatives to Cooperative Agreements	6
Additional Information	7
Conclusion	7
Appendix A: Questionnaire	8
Appendix B: Letter	11
Appendix C: Question 2: <i>What do you feel are 3 strengths of the current cooperative agreements</i>	13
Appendix D: Question 3: <i>What do you feel are 3 weaknesses of the current cooperative agreements?</i>	22
Appendix E: Question 4: <i>List 3 things that would make Cooperative Agreements more effective..</i>	30
Appendix F: Question 5: <i>If there is not an adequate process to evaluate Cooperative Agreements, what suggestions would you make?</i>	37
Appendix G: Question 7: <i>In what ways could the role of the Regional Coordinator be improved?..</i>	41
Appendix H: Question 8: <i>If the Regional Coordinator does not have the necessary authority to implement the agreements and insure the HMB abides by them, please explain...</i>	47
Appendix I: Question 10: <i>If there is a better way than the current Cooperative Agreements for the new North American Mission Board (NAMB) to partner with state conventions in order to do evangelism and church extension, what do you suggest?</i>	50
Appendix J: Question 11: <i>If there is a better name for the relationship between NAMB and state conventions other than "Cooperative Agreements," what do you suggest?</i>	53
Appendix K: Question 12: <i>Do you have any additional information regarding cooperative agreements that you would like to share with the Study Group for Cooperative Agreements? If so, respond below or attach an additional sheet.....</i>	56
Appendix L: <i>Miscellaneous Information Provided on the questionnaire in response to closed-ended questions.....</i>	62

INTRODUCTION

Cooperative Agreements are contracts negotiated between the Home Mission Board (HMB) and state conventions, and clarify the manner in which the Home Mission Board and state conventions partner together to develop and implement a unified and strategic plan of mission work in the states. Cooperative Agreements between the HMB and most state conventions have been in place since the early 1960s. Since 1971, Regional Coordinators have been given the assignment of representing the HMB in the final negotiation of the joint plans of work and their funding.

The purpose of this research project is to gather information from knowledgeable state convention and HMB personnel regarding the effectiveness of the current agreements, their strengths and weaknesses, the effectiveness of the role of the Regional Coordinators, and suggestions for establishing a partnership between the new North American Mission Board (NAMB) and state conventions. This research was conducted for the Study Group for Cooperative Agreements formed by the Implementation Task Force (a group appointed by the Executive Committee, SBC to implement the Covenant for a New Century).

The narrative in this paper summarizes information submitted by respondents to a questionnaire. Detailed responses to open-ended questions are included in the appendixes of this report. Most of the information provided supports the need for Cooperative Agreements and the work of Regional Coordinators, although numerous suggestions for improvement were also provided. Generally, survey participants made little distinction between Cooperative Agreements as written documents and the Cooperative Agreement process.

METHODOLOGY

A questionnaire was mailed to key persons with experience in working with existing Cooperative Agreements. All state convention executive directors, state mission directors, state evangelism directors, and selected present and retired employees of the Home Mission Board were mailed questionnaires. Combined, 128 questionnaires were mailed—110 were sent to state convention personnel, 5 were sent to retired HMB personnel, and 13 were given to current HMB employees.

A questionnaire was mailed to each participant on March 21, 1997. (See appendix A for a copy of the questionnaire.) Included with each questionnaire was a short letter signed by Dr. John Yarbrough, chairman of the ITF and chairman of the study group, requesting participation in the survey (for an example of one of several variations of the letter, see appendix B). Also included was a self-addressed postpaid envelope. A follow-up postcard was mailed on April 10 to those not responding to the initial request for participation in the survey.

RESPONSE RATES

Combined, 91 people responded to the survey, an overall response rate of 71 percent.¹ The response rates for the different audiences are as follows:

State convention executive directors	74%
State mission directors	72
State evangelism directors	55
HMB retirees	100
HMB employees	92

¹ As of April 25, 1997.

The bulk of the people surveyed are state convention personnel, therefore overall responses to questionnaire items will be largely representative of their perspectives. For that reason the responses of state convention and HMB personnel will be reported separately where substantially different.²

EFFECTIVENESS OF COOPERATIVE AGREEMENTS

Survey participants were asked to rate the effectiveness of the "current Cooperative Agreements in developing a partnership between state conventions and the Home Mission Board (HMB) for doing evangelism and missions." Overwhelmingly, respondents rated the agreements *effective*. In fact, only two participants rated the agreements as *ineffective*. The breakdown of responses is as follows:³

	<u>State Convention</u>	<u>HMB</u>
Very effective	64%	41%
Somewhat effective	34	53
Somewhat ineffective	0	0
Very ineffective	3	0
Both effective and ineffective	0	6

Note that almost two-thirds of state convention respondents rated the current Cooperative Agreements as *very effective* and that state convention personnel rated the effectiveness of the agreements higher than HMB personnel. It may be that Board personnel rate them lower because they are more familiar with the agreements than are state convention personnel, thus more familiar with their weaknesses. Also, there is some tension at the Board between program personnel and coordination concerning the role of coordination.

STRENGTHS OF COOPERATIVE AGREEMENTS

Respondents were asked to list three strengths of the current Cooperative Agreements. Everyone listed strengths of the current agreements, even those who rated them *ineffective*. Detailed responses to this question are included in appendix C. Generally the major themes expressed in response to this section (in order of frequency) are as follows:

1. They promote cooperation/partnership between the state conventions and the Home Mission Board.
2. They promote development and implementation of a joint mission strategy and joint planning.
3. They provide an opportunity for communication.
4. They provide accountability and insure quality.
5. They promote responsible stewardship of funds/eliminate duplication of efforts.
6. They provide for resources where needed but not otherwise available.
7. They provide a delivery system for the HMB to work in states.

² *HMB personnel* refers to present employees as well as retirees. There are previous HMB personnel now serving in state conventions. These survey participants are included as state convention respondents only.

³ Percentages may not add to 100 percent due to rounding. Miscellaneous responses added to this closed-ended question are included in appendix L. These comments generally endorse the concept of Cooperative Agreements.

WEAKNESSES OF COOPERATIVE AGREEMENTS

Respondents were also asked to list three weaknesses of the current Cooperative Agreements. Fifteen people, all state convention personnel, either did not list weaknesses or specifically replied there are no weaknesses of the present agreements. Of those who did list weaknesses, the responses were varied. An attempt has been made to identify some of the recurring major themes, and they are listed below in order of prevalence. The most frequently occurring themes were provided by about a fourth of survey participants, while the least frequently reported themes were representative of 5 percent of participants. Note that the identification of themes involves some interpretation of responses by the author of this report; however, near verbatim responses are included in appendix D.⁴

1. Most frequently cited was that current Cooperative Agreements are too inflexible. This was expressed as being unable to respond to urgent needs or opportunities that arise because the time line in negotiating and implementing the agreements is too long.
2. There is too much paperwork and bureaucracy in the process. In particular Board Actions were singled out as a problem.
3. Lack of communication, coordination and enforcement of the agreements within the HMB were cited. It was noted several times that HMB personnel violated the agreements. Also there appears to be a lack of communication within the Board between administrative/coordination and program personnel.
4. The Board exercises control over some state conventions which borders on paternalism. Concern was also raised over the Board's unilateral decision making.
5. There needs to be more state input into the agreements, especially the needs as perceived by state convention personnel. National priorities tend to be more important than state priorities in implementation.
6. There is not enough focus on strategy or strategy planning. It was expressed that strategy and funding should be combined.
7. There is sometimes poor communication between the HMB and state conventions. New staff at the HMB and state conventions need to be educated concerning the agreements. Everyone needs to be educated to roles and responsibilities.
8. There is not enough evaluation of the Cooperative Agreements. In particular there is no accountability and no recourse for violation of the agreements.
9. The agreements need to be customized for individual state conventions.
10. There is not enough ministry/program input into the coordination process.
11. There are inadequate funds in some state conventions to implement the agreements.

The responses of HMB personnel, either retired or presently employed, touched on and are included in the most of themes surfaced above. The ordering of the themes is different for HMB personnel. The two most frequently cited weaknesses are poor communication between the HMB and state conventions, and the need to evaluate and hold accountable (numbers 7 and 8 above). The next two most frequently mentioned are lack of

⁴ Minor editing has been done to correct spelling, grammar and in some instances to clarify ideas.

communication, coordination and enforcement of agreements within the HMB, and not enough program/ministry input into the process (items 3 and 10 above). The issue of flexibility was the fifth most cited weakness (number 1 above). HMB personnel did not mention the inadequate state convention input into the process (number 5 above).

SUGGESTIONS FOR MAKING COOPERATIVE AGREEMENTS MORE EFFECTIVE

Respondents were asked to list three suggestions for making the Cooperative Agreements more effective. Responses were similar to those given as weaknesses of the current agreements since the way to improve a system is to correct its weaknesses. There is a wide variety of responses to this question which is included in appendix E.⁵ The major recurring suggestions tendered are as follows:

1. Make the current agreements (process) more flexible. In particular, make adjustments to rapidly changing priorities and needs. Be more flexible in the spending of funds
2. Simplify the process. Eliminate duplicate administration. Send money to the states without the hassle and paperwork.
3. Increase state involvement in the process—more bottom-up planning from the state to the HMB.
4. Increase communication between the HMB and state conventions and between program people and administrators. Educate all concerned as to roles and responsibilities—especially new personnel.
5. Give more attention to evaluation and requiring accountability.
6. Make the process more strategy driven and do frequent planning.
7. Change the distribution of funds. Distribute the funds more quickly. Divide the budget into 12 equal amounts and send funds to states monthly.
8. Allow for more program staff input into the process.
9. Customize the agreements for state conventions.
10. Negotiate as partners.

As with weaknesses of the current agreements, HMB staff echoed the same suggestions for improvement as did the entire group, although the ordering was somewhat different. The most frequently cited suggestion for improvement by HMB staff, either past or present, was to increase communication between the HMB and state conventions, and to educate everyone on the process, roles, and responsibilities. The second most frequently cited suggestion is to increase program staff input into the process.

EVALUATION

Respondents were asked if there was an adequate process to evaluate implementation of the Cooperative Agreements. The response is as follows:

	<u>State Convention</u>	<u>HMB</u>
Yes	62%	18%
No	34	82
Don't Know	1	0
No Response	3	0

⁵ Sixteen people did not respond with suggestions for improvement.

The majority of state convention personnel believe there is an adequate evaluation process in place. On the other hand, HMB-related personnel overwhelmingly felt there was not an adequate evaluation process in effect.

Those who felt there was an inadequate evaluation process were given the opportunity to offer suggestions for improving evaluation—31 people responded with suggestions. The suggestions included giving the Regional Coordinators authority to evaluate the agreements, setting up an annual review where program leaders evaluate the agreements, establishing evaluation criteria before implementation, focusing on results, developing an evaluation instrument, and developing HMB/state convention strategic long-range planning. Detailed responses are included in appendix F.

ROLE OF THE REGIONAL COORDINATOR

Survey participants were asked to evaluate the role of Regional Coordinator in implementing Cooperative Agreements. The response for all participants is as follows:

	<u>State Convention</u>	<u>HMB</u>
Very effective	65%	47%
Somewhat effective	32	35
Somewhat ineffective	1	12
Very ineffective	1	0
Other		6

Overall, 95 percent of all respondents evaluated the role of Regional Coordinator as *effective*. State convention personnel tended to rate the role of the Coordinator a little higher than Board personnel.⁶

A follow-up question inquired about the ways the role of the Regional Coordinator could be improved. Seventy-seven people responded to this question, and their detailed responses are included in appendix G. The most frequent suggestion was to empower the role of Regional Coordinator in administering the agreements. This included giving him more authority for negotiation and more flexibility. A second major theme is that the Coordinator should become much more familiar with the local situation in state conventions and should become much more of a strategist. It was suggested by several that he should live on the field. The third major theme is that more input is needed by program personnel. In some instances this is to be accomplished by greater communication between Coordinator and program personnel, and in other instances by diminishing the role of the Coordinator and increasing the role of program personnel in the Cooperative Agreement process.

A second follow-up question asked if the Regional Coordinator has the necessary authority to implement the agreements and insure the HMB abides by them. The responses are as follows:

	<u>State Convention</u>	<u>HMB</u>
Yes	70%	29%
No	22	41
Other ⁷	5	24
Non response	3	6

There is considerable difference of opinion between state convention personnel and HMB personnel. The large majority of state folks believe the Coordinator has the authority, while

⁶ A number of comments supportive of the Regional Coordinators were written on the questionnaires. These have been included in appendix L.

⁷ *Other* is a combination of unsure, yes and no, and the coordinator should not have the authority.

less than a third of HMB respondents report he has the authority. Thus, the perceptions, inside and outside the Board, are vastly different.

Respondents who answered *no* to this question were asked to explain their negative response. While several explanations were tendered, two major themes were 1) that a Regional Coordinator could not make a decision without consulting supervisors or program leaders and 2) other personnel at the HMB either were unaware of negotiations of the Regional Coordinator or chose to ignore them, in effect violating agreements. Detailed responses are included in appendix H.⁸

EFFECTIVENESS IN TARGETING STRATEGIC NEEDS

A separate question addressed the effectiveness of the negotiation meetings between the HMB and state conventions in targeting the greatest strategic needs in a state. The responses for all participants are as follows:

Very effective	46%
Somewhat effective	33
Somewhat ineffective	13
Very ineffective	4
Non response	3

The meetings are viewed overall as effective in surfacing strategic needs and there tends to be only minor differences in the perceptions of state convention and HMB staff in regard to this matter.⁹

ALTERNATIVES TO COOPERATIVE AGREEMENTS

Participants were asked whether there is a better way than the current Cooperative Agreements for the new North American Mission Board to partner with state conventions in order to do evangelism and church extension. There was a difference of opinion between state convention and HMB-related personnel. The majority of state convention respondents indicated there is not a better way than the current Cooperative Agreements, while the majority of HMB-related personnel indicated there is a better way. Responses are as follows for both groups:

	<u>State Convention</u>	<u>HMB</u>
Yes	27%	59%
No	59	29
Perhaps	5	0
Don't know/non response	8	12

Respondents indicating that there is a better way were asked to provide suggestions. Most of what was offered in response were not really alternatives to the current Cooperative Agreements, but were suggestions for improvement to the current agreements. Only two or three suggestions were alternatives to the current process such as 1) letting program people make and implement all agreements and 2) letting old state conventions retain the funds that normally come to them from the HMB. The most prevalent improvement suggested was the need for more strategy development in the current process with corresponding emphasis on joint HMB/state planning and attention to state convention needs. The second most

⁸ Additional comments, usually qualifications to their response, were written in the margins of the questionnaire by those who did not respond *no* to the above question. The additional comments seem to group into three categories: 1) as best as I can tell he has the necessary authority, 2) his authority depends on the issues involved, and 3) he has too much authority. See appendix L for detailed responses.

⁹ A wide variety of additional comments pertaining to this question and not easily summarized are included in appendix L.

tendered suggestion is that the current process needs to be more flexible. Verbatim suggestions are included in appendix I.¹⁰

A separate question inquired whether there is a better name for the relationship between NAMB and state conventions other than "Cooperative Agreements." Responses are as follows:

	<u>State Convention</u>	<u>HMB</u>
Yes	23%	35%
No	55	41
Perhaps/don't know	15	24
Non Response	7	0

Overall, roughly half did not think there was a better term, a fourth indicated a name change would be better, and a fourth did not care or could not think of more attractive alternatives.

Name changes suggested by those responding affirmatively are included in appendix J. Most of the suggestions offered included "partnership" in the wording. "Partnership Agreements" seemed to be the most prevalent response. Several people suggested "strategic" in the wording such as "Strategic Partnership Agreements."¹¹

ADDITIONAL INFORMATION

Respondents were offered the opportunity of providing additional information to the Study Group for Cooperative Agreements.¹² Thirty-eight respondents provided additional comments. The verbatim for these comments are found in appendix K. About half of the participants responding to this question offered words of support for the current Cooperative Agreements and the need for this type of cooperation between NAMB and state conventions. Other comments elaborated upon suggested changes to the Cooperative Agreement process, most of the ideas expressed in this section were included elsewhere in the questionnaire.

CONCLUSION

Current Cooperative Agreements are overwhelmingly viewed as effective in developing a partnership between the Home Mission Board and state conventions. While there are weaknesses of Cooperative Agreements—primarily in their implementation—similar agreements are needed between the North American Mission Board and state conventions. Regional Coordinators are also overwhelmingly viewed as effectively implementing the agreements, even though a number of suggestions were made concerning their roles and responsibilities.

¹⁰ A number of those who did not respond yes to the above question provided comments in the margins. Most indicated support for the current Cooperative Agreements, with some of them offering suggestions for improvements. See appendix L.

¹¹ Appendix L contains comments of respondents who do not affirm a name change. Most affirm the present name—a few say that a name change is not the issue or it doesn't matter.

¹² Participants also responded with additional comments to closed-ended questions. These comments have been captured and included in appendix L. Note that much of the information in appendix L is referenced elsewhere.

APPENDIX A

Cooperative Agreements Evaluation Survey

Confidentiality: Responses to the following questions will be summarized by the Research Division, HMB. While specific comments will be shared with the Study Group for Cooperative Agreements, no names will be attached. Comments will only be identified by the categories of (1) state convention executive directors, (2) state convention evangelism directors, (3) state convention mission directors, (4) HMB personnel, etc.

1. How effective are current cooperative agreements in developing a partnership between state conventions and the Home Mission Board (HMB) for doing evangelism and missions?
- ☐ Very effective
 - ☐ Somewhat effective
 - ☐ Somewhat ineffective
 - ☐ Very ineffective

2. What do you feel are 3 strengths of the current cooperative agreements?

3. What do you feel are 3 weaknesses of the current cooperative agreements?

4. List 3 things that would make cooperative agreements more effective.

5. At present, is there an adequate process to evaluate the implementation of cooperative agreements?
- ☐ Yes
 - ☐ No

If no, what suggestions would you make?

6. How would you evaluate the role of regional coordinator in implementing cooperative agreements?
- ☐ Very effective
 - ☐ Somewhat effective
 - ☐ Somewhat ineffective
 - ☐ Very ineffective

7. In what ways could the role of the regional coordinator be improved?

8. Does the regional coordinator have the necessary authority to implement the agreements and insure the HMB abides by them?

- ☐ Yes
☐ No

If no, please explain.

9. How effective are the negotiation meetings between the HMB and state conventions in targeting the greatest strategic needs in a state?

- ☐ Very effective
☐ Somewhat effective
☐ Somewhat ineffective
☐ Very ineffective

10. Is there a better way than the current cooperative agreements for the new North American Mission Board (NAMB) to partner with state conventions in order to do evangelism and church extension?

- ☐ Yes
☐ No

If yes, what do you suggest?

11. Is there a better name for the relationship between NAMB and state conventions other than "cooperative agreements"?

- ☐ Yes
☐ No

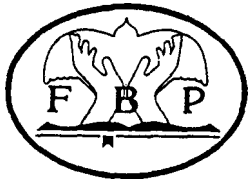
If yes, what do you suggest?

12. Do you have any additional information regarding cooperative agreements that you would like to share with the Study Group for Cooperative Agreements? If so, respond below or attach an additional sheet.

Thank you for your participation.

Please return the completed questionnaire in the postpaid business reply envelope to the Research Division, Home Mission Board, SBC, 4200 North Point Parkway, Alpharetta, GA 30202-4174

APPENDIX B



First Baptist Church **Perry, Georgia**



March 21, 1997

Dear Southern Baptist Friend:

The Implementation Task Force (ITF) for the new North American Mission Board (NAMB) has formed a group to study cooperative agreements between the Home Mission Board (HMB) and state conventions. Results of this study will be given to the leadership of NAMB to use in their consideration of strategic relationships with state conventions as we move into the 21st Century.

You are an important partner in the present process and your opinions will be important as we plan for the future. Please take just a few minutes to complete the enclosed questionnaire and return it in the enclosed postpaid envelope.

In addition to your input, the perspectives of state conventions will be represented by the inclusion on the study group of 6 state convention executive directors who will serve with 2 pastors and 5 HMB staff. The study group is being assisted by the Research staff of the Home Mission Board.

Thank you for taking the time to share your thoughts. These are exciting days as we anticipate the opportunities God has placed before us to join together in a dynamic way to reach our world with the gospel.

Sincerely His,

John O. Yarbrough

APPENDIX C

Question 2: *What do you feel are 3 strengths of the current Cooperative Agreements?*

STATE CONVENTION RESPONDENTS

1. The Regional Coordinators make it personal
 2. As executive director I relate with one person—not a committee or a department
 3. The schedule has made it possible to plan on budgets early
-
1. The planning of projects that they require
 2. The communication with our largest board that they require
 3. The quality control they engender
-
1. Cooperative Strategic Planning
 2. Cooperative missions support
 3. Unified national strategy
-
1. Mutual concerns
 2. Better use of available dollars and personnel
 3. One clear strategy and purpose
-
1. Implementation of a national missions strategy, involving the HMB, state conventions, associations and churches
 2. Allows the entity that is nearer to the need to present needs in cooperation with the HMB program heads.
 3. Takes into consideration the differences in the various state conventions
-
1. Forces dialogue with state/HMB staff
 2. Allows for better budget planning by state
 3. Helps establish priorities
-
1. Provides opportunities to dialogue and to personalize strategies
-
1. A unified support system
 2. A national strategy
 3. A strong delivery system to plan and finance the work
-
1. Functions as a gentleman's agreement regarding what we intend to do cooperatively within our state convention
 2. Permits flexibility as needs change within a budget year
-
1. Develop strong support between state leader and their churches and the HMB
 2. Most objective approach to funding a unified plan for all ministries of the HMB
 3. Develops an open communication between state leaders while building great trust between the two entities; this facilitates doing the work of the HMB
-
1. Coordinated state convention and SBC strategies
 2. Joint partnership with churches, state convention and HMB
 3. A chance to decide on joint priorities
-
1. Helps or allows us to do the work in the state
 2. Provides program funds, salaries and needs we would not have otherwise
 3. Keeps partnership approach

1. The HMB participates and cooperates with the state convention in developing a statewide strategy indigenous to that region
 2. The executive director, responsible for the overall budget, negotiates the overall budget with the planning Regional Coordinators at HMB, giving holistic approach
 3. Program leaders strategize consult and plan with HMB staff
-
1. Acknowledges partnership between SBC and state conventions
 2. Provide opportunities in the newer states where there would otherwise be no resources available for evangelistic and missions projects
 3. Provide assistance for placing personnel in the newer states
-
1. Recognize the partnership between state conventions and HMB
 2. Provide the mechanism to accomplish both HMB and state goals, strategies, etc.
 3. Provide for communication between partners
-
1. Mutual input/agreement in employing personnel
 2. Financial assistance offered, without which 1/2 of our budget would be missing
 3. Open communication/negotiation between the state and HMB
-
1. Avoids duplication of personnel, time and money
 2. The state convention plays a vital part in strategy and implementation to reach its state
 3. State convention needs, church needs, can be plugged into HMB programs and resources
-
1. They model and incarnate partnership which is needed in Baptist life
 2. They give a framework for our cooperative work...state conventions and NAMB...needed as leadership changes, grows, new paradigms emerge, etc.
 3. They are established jointly...a covenant between partners
-
1. Express the basic missiological principle of cooperation in strategy financing and planning for personnel, etc.
 2. Helps state conventions know exactly NAMB pieces of funding, plans
 3. Puts in black and white the parameters: we "will do this," we "will NOT do this," etc.
-
1. The state conventions are kept abreast with HMB programs/emphasis
 2. The states help the HMB understand local cultural, demographic, and church issues
 3. Mutual planning and budgeting strengthen both
-
1. Define roles of state and HMB
 2. Provide financial parameters for shared work
 3. Define personnel issues/relationships
-
1. Unified ministry together
 2. Cooperation in determining priorities in ministry
 3. Regional Coordinators. I have dealt with two: Dean Doster and Jim Coldiron. Very helpful
-
1. Develops a strong sense of partnership between HMB and state conventions
 2. Leads to joint planning where each partner brings unique insights and gifts to the table
 3. Great encouragement to new work areas
-
1. Helps to see the "big picture" of missions in America
 2. Connects HMB and state conventions in mission work
 3. Channel of communication between states and HMB

1. Keeps duplication of efforts minimized
 2. Provides opportunity for shared planning
-
1. Clearly stated guidelines
 2. Commitment of support
 3. National/local teamwork approach to addressing missions needs
-
1. Understandings about how we work together to offer coordinated services to churches and associations (cooperative planning)
 2. Agreements about how who has the initiative in various areas
 3. Standard of mutual accountability
-
1. Recognizes mutual partnership of national and state entities in the home missions strategy and implementation
 2. Allows sufficient freedom for each entity to minister as God leads while, at the same time, maintaining good coordination
 3. Avoids duplication and competition between HMB and states
-
1. Work is planned cooperatively
 2. Funding done upon an agreed on ratio
 3. There is joint responsibility and support for missionary personnel
-
1. Direct relationships are build
 1. Builds on trust
 3. Works off of priorities
-
1. Encourages a sense of partnership
 2. Promotes long-range planning
 3. Establishes accountability
-
1. Allows younger works to produce a "full plate"
 2. Insures quality work
 3. Bonds state and national agency
-
1. Enables national resources to be committed wisely and contextually to relevant gospel issues
 2. Redistributes resources appropriately to areas of mission need across US
 3. Encourages input and ownership from local Baptists that sustain ultimately the initiative
-
1. External observation sees things internal observation might miss
 2. Financial help
-
1. The evangelism section personnel have been extremely helpful in negotiating changes where needed and in facilitating the general process
-
1. The feeling of partnership participation in evangelism and missions
 2. The individualized response to need by national and state conventions
 3. The possibility of greater resourcing of greater need
-
1. Cooperative planning between our Convention and the HMB
 2. Ability to make budget line adjustments

1. Encourages continued conversation about programs, etc.
2. Helps to avoid duplication of programs, personnel, etc.
3. Respects the work/integrity of the other entity

1. Accountability
2. Electronic method

The key word here is cooperative—as it involves partners working together to carry out the Great Commission in every city and every place

1. Openness with the Regional Coordinator
2. Willingness to make adjustments during the year
3. Support of the evangelism personnel at HMB to assist in development of budgets

1. Open communication between national and state leaders
2. Coordinated emphasis for evangelism and missions
3. Helps keep missions in the spotlight

1. Helps maintain the connection needed with the whole SBC constituency through cooperative giving
2. Achieve unified goals, projects
3. Agreements as co-equals

1. Provides for cooperative partnership between state convention programs and HMB entities
2. Provides necessary funding for state convention to be able to support programs they could not do alone
3. Allows people in states to see a return on their mission contributions

1. HMB has had to acknowledge state convention interests and concerns. Process is basically a reflection of New Testament democracy at its best

1. Affirmation of the autonomy of each organization
2. Initiative of the HMB to develop Cooperative Agreements
3. The determination of new moneys allocation by priority

1. Working relationships
2. Understanding and expectation
3. Guide

1. Maintains relationships
2. Assists with priorities
3. Funds priority ministries

1. Provides partnership
2. Provides funding for needed staff
3. Calls for state to provide greatest portion 60/40

1. Helps avoid duplication of effort
2. Makes genuine partnership possible between states and SBC agency
3. Gives SBC agency visibility within existing superstructure

1. Face to face meetings
 2. Gives all input
 3. Strengthens total work
1. Magnified our partnership
 1. Clarifies our joint working relationships
 3. Involves the Board in missions work in the state
1. You know up front what is expected
 2. It is geared to the relative strength of conventions in its percentages
1. Cooperative approach to missions
 2. Encourages accountability and responsibility and effectiveness in the use of missions funds
 3. Ties state and national missionary personnel to one another and to mutually depend upon strategies
1. Establish basic guidelines for the HMB personnel to state convention
 2. Establish planning and funding procedures for HMB and state convention
 3. Define employer and employee relationships with appointed missionary personnel
1. A partnership of cooperative missions strategy and funding
 2. A recognition of trust and confidence in each partner's ability to fulfill their mission together
 3. A clear description of expectations from both partners in how to fulfill and utilize mission resources
1. Defines financial relationship
 2. Frameworks working relationships
 3. Allows review
1. Promotes cooperation
 2. Facilitates networking
 3. Clarifies communication
1. Demands accountability
 2. Allows some flexibility
 3. Requires long-range planning
1. There is mutuality of initiative
 2. They are reviewed annually
 3. They are implemented faithfully
1. To give opportunity for dialog
 2. Prioritizes strategies
1. On-field negotiations
 2. Sensitivity to needs
1. It makes for a united, planned mission program
 2. It keeps Southern Baptists from duplicating their efforts
 3. It helps make mission dollars go further

1. Joint planning between State Program Director and HMB
 2. State Missions Director meeting with HMB Vice Presidents
 3. Meeting with Coordination twice yearly
-
1. Provides for a plan of relationship between national and state entities
 2. Provides for an outline of relationships for jointly funded personnel
 3. Provides a plan for negotiation of funds coming into the state
-
1. Demands the development of—and close adherence to—a long-range strategy in the state convention
 2. Enables prioritization of national resources within a manageable time frame
 3. Provides for equitable base for fair and balanced negotiation process
-
1. Agreement of both entities in the strategic use of funds
 2. Negotiation permitted for changes in the agreement annually
 3. Agreements are well defined promoting good understanding
-
1. Expresses the basic missiological principle of cooperation in strategy financing, and planning for personnel, etc.
 2. Helps state conventions know exactly NAMB pieces of funding, plans
 3. Puts in black and which the parameters: we “will do this,” “we will NOT do this,” etc.
-
1. Aids in development of common strategies
 2. Brings national missions closer to home
 3. Cultivates partnership between state conventions and national agencies
-
1. National agency honors autonomy of state convention and local association—does work cooperatively, not unilaterally
 2. Lets entities closer to field set priorities
-
1. Give state convention a voice in the planning of what is happening in the state
 2. Keep down duplication
 3. Conserves resources; makes what state conventions and HMB do together more intentional and strategic
-
1. Provides a partnership to enable Tennessee to carry out the Great Commission
 2. Provides resources enabling Tennessee to have staff positions we could not have on our own
 3. Calls for Tennessee to provide the largest amount for work in our state
-
1. It allows for advanced planning related to budget needs
 2. It promotes a partnership arrangement
 3. It allows for negotiation and change
-
1. Mutual respect
 2. Cooperation
 3. Personal

HMB RESPONDENTS

1. Critical national issues can be emphasized even if state is reluctant to do it
2. Missionary pay scales can be made more equitable—minority pastors, especially
3. COOPERATION is the keystone to state-HMB relationships—not unilateral favoritism

1. A relationship of trust and understanding is developed
2. A planning process is established
3. Agreed upon goals are defined and budgeted

1. The agreement is between boards and not agency heads or employees
2. The agreement clearly states what each agency expects of the other
3. The agreement calls for an annual review and update
4. The agreement implemented the SBC mandate for a "uniform program"

1. Assures usage of funds as agreed
2. Develops and implements coordinated strategy
3. Responsible stewardship by states and Board

Some of the cooperative understanding is necessary or the stronger state conventions will go their own way, which they are capable of doing, and NAMB will be involved only in the weaker state convention. At some point the stronger state conventions will withdraw their money to do the work in their own states and certain selected new work states where they have special connections. The concept of a uniform strategy will be lost.

1. Gives opportunity for cooperative planning
2. Gives missionaries a sense of national involvement
3. Helps meet unique needs of different conventions

1. Maintains relationships with state conventions
2. A synergistic (partnership) approach is much more effective because of a wider base of financing mission projects
3. This system is well understood by participants

1. Provides for a Cooperative Partnership in state and HMB work in the area of strategy planning
2. Provides clear information on financing of joint work
3. Provides clear information on personnel that are jointly appointed

1. Provides a working agreement
2. Provides a working agreement which defines normal budgetary limits and processes
3. Provides a working agreement that leaves room for some creative and flexible field servicing

1. Creates a working relationship and joint strategy between states and HMB
2. Attempts to target and prioritize funding to states according to need
3. Allows states an opportunity to impact budget at HMB

1. Joint planning/strategy
2. Regular communication
3. Require long-range planning

1. It is a system that has been in place for a long time and people are familiar with it. It creates a reason for states and SBC agencies to work together
2. It provides for coordinated planning and minimizes duplication of ministries. It is more efficient to have one mission-sending agency than 40
3. The HMB can share in the deployment of missionary personnel and tell the national story of missions. This process aids in drawing mission funds into the Cooperative Program. As an added benefit, the state receives a greater blessing by sharing in the Cooperative Program process

1. Gives positive appearance of the partnering of the two entities
2. Attempts to establish cooperative working relationship
3. Guidelines for funding and securing jointly-employed personnel

1. Clear understanding of role expectation from both entities
2. Clear lines of communication between states and HMB
3. Annual review of Cooperative Agreements and needed changes

1. Trust
2. Joint planning
3. Accountability

1. Develops a national Strategic Mission Plan of work
2. It is a partnership between states and HMB
3. It keeps communication clear and open

1. Creates strong partnerships between HMB/state convention
2. Makes unique opportunity for HMB to influence the work, direction and priorities in a state convention
3. Is an instrument that facilitates impacting a state convention with HMB priorities—viz. church planting, evangelism

APPENDIX D

Question 3: *What do you feel are 3 weaknesses of the current Cooperative Agreements?*

STATE CONVENTION RESPONDENTS

none, really

1. The lack of trust that pervades SBC (American) life always is a factor
2. Bureaucracy
3. The regional representative is not the administrator, he is the expediter

1. HMB staff not supportive
2. Too vague
3. Lack unity

1. Need more frequent visits of Regional Coordinator
2. More long-range commitments
3. Should be revised more often

1. Occasionally (not often) the HMB decides where money will be available and the state conventions make requests based on money availability
2. New church funds have been divided into Black, Language, and Anglo departments. The state convention needs to draw from one fund

1. HMB not always a partner—unilateral decisions
2. Control
3. Not customized enough

1. Paper work
2. Communications at the Board

1. New states need more financial support
2. Need less time to make changes in plans
3. The turn around time of program funds

1. There are several layers of bureaucracy to get through presently in order for an agreement to be fully actualized

1. The HMB program staff ignores the Cooperative Agreement in too many cases which causes friction between the entities; this can be stopped by good HMB administrative enforcement
2. Need cleaner system for sending funding/ the present "Board Action" system is a nightmare; it causes many PR problems
3. Too many other funding instruments circumvent the Cooperative Budget

1. Too much paper work or duplication of work
2. If budget and approved it still requires more action

1. Response time is too slow—approximately 2 years.
2. The money route is too cumbersome for the old states where some money is returned to the states after making an unnecessary circle: state to Nashville, to HMB, and then back to state. Costs time, money, personnel, and paperwork
3. Misrepresents the actual number of home missionaries

1. In addition to contacts by HMB Regional Coordinator, more dialogue should take place between HMB president and state executive directors
 2. Need more flexibility on use of HMB funds
-
1. Regional Coordinators have little or no knowledge in a direct way concerning local needs
 2. Five-year strategy planning sessions have not been effective
 3. Single, uniform mission plan becoming harder to realize across the nation
-
1. Not enough attention is given to customization ...state by state
 2. Format it differently make reader/user friendly...present format is not conducive to read/study
 3. NAMB tends to see "itself" as senior partner...in reality the partnership should be equal...that, if there is a senior partner it is, by Baptist polity, the state convention
-
1. There should be more flexibility in re-negotiating and implementing
 2. For some HMB, it becomes "weasel words": "We can't do that, because it's not in the Cooperative Agreement."
-
1. Unsure how individual agreements relate to a national strategy
-
1. Paperwork to follow-up agreements. Forms and more forms.
 2. Sometimes staff at HMB hard to convince of local needs, but I see that as fairly normal
-
1. At times the HMB has acted unilaterally which has decreased effectiveness and created some bad feelings (i.e. in scheduling of meetings in state convention area that with joint planing could have been more effective)
 2. Joint planning has been very helpful (as indicated)—but needs to be regular rather than sporadic
 3. Need more effective evaluation of joint-planned and joint-funded events, programs, etc.
-
1. Not enough accountability in planning and budgeting
 2. Regional Coordinators lack authority to ensure Cooperative Agreements work well
 3. Cooperative Agreements need more customization for states
-
1. Too much paperwork
 2. Inadequate emphasis on special needs of states
 3. Failure to fully recognize the "home mission" dimension in some older states
-
1. Failure of persons down in the ranks to abide by the agreement
 2. Lack of clear definitions in the planning process
 3. Churches and associations seeking to circumvent the Cooperative Agreements
-
1. Some HMB program personnel ignore the mutual nature of the agreement
 2. Some state program personnel ignore the mutual nature of the agreement
 3. (note: There is little wrong that can't be fixed within current system)
-
1. The exclusion of personnel for missionaries on college campuses
-
1. Cooperative Agreements are strong when there is good relationships, so it depends upon personal relationships

1. Turnaround time on funding requests
 2. At times a lack of trust is demonstrated toward the state requests by the HMB
 3. The planning process is so far ahead of our associations and churches that some of our associational and church leadership feel the planning is unrealistic and out of touch; it has been suggested by DOMs that a six-month planning would be more effective (I disagree with that), however, greater flexibility is needed
1. Program HMB staff may obtain ownership and dominate agreements with weaker state conventions
 2. Cooperative Agreements can inhibit short-term response to immediate needs
 3. Misdirected efforts in Cooperative Agreements have long-term structural implications for the state convention—input should always include the local/state perspective
1. Dictates to state
 2. Too much paper work
 3. Allow states to do their work without outside restrictions
1. Too much red tape
 2. Time line is too long
 3. There are more different account codes than necessary. Reduction of details could result in better management

The lack of input from state staff (Iowa)

None

Don't know of any

1. Always having to come up with 50% matching funds when budgets are already stretched

Not sure that weaknesses are evident from my point of view

1. Most things can be shaped to be even more effective
1. Inability to made budgetary adjustments due to departmental constraints
 2. It may seem at times that HMB has control over the state
1. Process of application and planning is time consuming and not necessary
 2. To obtain new money you must persuade State Executive Secretary to regard your new program as the #1 state priority
1. Money decisions appear to be concluded before the Regional Coordinator arrives on field
 2. Very little flexibility
 3. More weight needs to be given to state program leaders
1. More weight tends to be placed on and primary negotiations tend to focus on Missions Department goals at the expense of Evangelism goals
 2. Not much weight given to the interdependency of all state conventions (i.e. a decision change by Texas significantly affects pioneer state conventions)
1. Needs a more comprehensive planning agreement
 2. Lack of flexibility

1. Limited response to urgent needs and/or opportunities that arise
2. Need more flexibility
3. Uncertainty of funding requests; inadequate state funds

1. Response time for needs
2. Tennessee Baptist should have the ability to decide best use
3. After budget approved, no further approval should be needed

1. We must be able to finalize the negotiation in March instead of September or October; state budgets need to be completed by September
2. SBC personnel need to understand we in the state know better what is needed here than the national agencies can know

1. Is not seriously reviewed annually
2. Basic uniform document for each state, not customized
3. Somewhat top-down

1. Weaker conventions are limited to matching funds they many times do not have
2. Terms are dictated to weaker conventions—it is not a partnership of equals, while stronger states get a better hearing

1. Current “Board Action” process
2. Funding and strategy need to be negotiated together (at present, strategy rests with HMB program leaders, funding with the Regional Coordinator)

The only weakness I have detected is when either party fails to comply with the agreements

1. The partnership language is mostly generic rather than tailored for the specific issue facing the convention

1. No flexibility in funding process
2. No flexibility in high-need status with multiple track/missions needs (little leeway in priority funding)

1. Too little time given to discussion of agreements
2. May make it harder to be spontaneous in meeting mission needs which arise after plans are made 2 years in advance
3. Sometimes hard to transfer funds during the year

1. Paperwork
2. Communication at the Board

1. Not enough input from people doing the ministry
2. Need for more input from “needs”
3. Tensions between administrative and program leaders

1. It can become too restrictive by not allowing changes to occur
2. It keeps the same strategy in place too long
3. It puts too many people in the decision making chair

1. Not the ability to address special needs that might arrive
2. Sometimes I had the feeling that there was a bottle-neck with coordination

1. National priorities are perceived to be more important than state priorities in actual implementation and practice
2. Too much time lag in addressing priorities within the state
1. Potential exists for state convention executive director to be the only real player at the table in negotiations
2. Priorities change in pioneer areas so quickly that a two/three year time lead is not always realistic

The agreement is very workable and I do not attribute weaknesses to it

1. State staffs not familiar with them, some never have seen them
2. For some HMB, become "weasel words": "We can't do that because it's not in the Cooperative Agreement"
1. Fosters "paternalism" over "partnership"
2. Cumbersome paperwork
3. Homogeneous assumptions about state conventions that are invalid
1. Only when the president of the agency unilaterally violates the agreement without as much as talking to the state convention
1. Program (HMB) people sometimes are not as informed as they need to be
1. Gives too much weight to Home Mission Board
2. After budget re-negotiation, have to spend too much time and energy getting funding
3. Evaluation good, but reporting procedures bad
1. Not flexible enough
2. It tends to penalize old-line states
3. A lack of information about percentages in other states
1. Calendar planning
2. Sometimes paternalistic
3. Budget planning—priority system

HMB RESPONDENTS

1. HMB money cannot be tracked clearly to specific projects and priorities
2. HMB money frees up state money to be used on unrelated projects, i.e. state camps
3. Some HMB strategists have worked outside the guidelines to court favors
1. A lack of understanding regarding the needed relationships, especially on the part of new personnel
2. The change of decision makers both at HMB or state, who are not acquainted with the process
3. The lack of funds on the part of the HMB or the state to implement defined goals
1. The HMB executive director and Regional Coordinators must evaluate if the HMB and the states are keeping their end of the agreement
2. Regional Coordinators need to take adequate time to review it each year
3. Honest discussion about questionable actions must take place

1. Not viewed as a cooperative relationship
2. Agreements made without coordination with appropriate Board staff
3. Coordination becomes implementation

In the beginning the Regional Coordinators were expected to reflect the plans of the various programs as correlated by the programs sections. The administration of the HMB would coordinate the views of the various sections which in turn would be conveyed to and negotiated with the state convention. My feeling is that gradually the Regional Coordinators became the spokesman for their own viewpoint on what program strategy ought to be and the budget negotiations determined the strategy, not the strategy the budget.

1. Planning could be more coordinated with programs
2. Planning should be flexible to meet annual changes
3. Less paperwork—more trust

1. By nature they are too rigid (treat all states the same)
2. Need to build in a “window of opportunity” to finance unusual or unexpected projects which are “outside” the budget
3. Somewhat based on history rather than strategy

1. Needs to address a more thorough plan of strategy development/budget determination process
2. Needs to include the participation of Mission Board program VPs along with state mission/evangelism lead persons (this is beyond Regional Coordinator and executive director)
3. Needs to address personnel issues such as process for recruitment/selection (rather than just have the Mission Board to process the state’s selectee)

1. Current Cooperative Agreements seem to focus more on money than strategy of either party
2. They are used more by management for control than by field servicing to get results
3. They do not have a process that calls for zero base budgeting

1. Used as a control element
2. Lacks flexibility in use of funds by states
3. Too few people involved in decision making

1. Little flexibility
2. Bypasses program priorities
3. Not always followed

1. Poor communication between HMB and state leadership which results in misunderstandings and contrasting priorities
2. Turfism causes each party to want more of the recognition from the churches. State executives must have an earlier voice in the national strategy. Ministries coming into the state must not be a surprise to state leaders
3. New leaders coming into an old system. There needs to be a way to effectively communicate to state leadership of the mutual benefits of good working cooperative agreements
4. The present system tends to push programs rather than enhancing ministries and relationships

1. Too generic
 2. Needs to be more visible in state, i.e. adopted by Executive Board of State
 3. Violations (on the part of either party) are not stated
-
1. Used by both sides (states and HMB program people) to justify their position
 2. Needs to have stronger guidelines of relationships and recourse when one side breaks agreement
 3. Lack of clearer understanding of HMB role, responsibilities as well as state's role and responsibility
-
1. Lack of program evaluation by non-program evaluators
 2. Tendency on part of states and HMB to make unilateral decisions affecting cooperative work
 3. Lack of commitment by HMB staff to honor true partnership
-
1. The need to evaluate the work being done
 2. Better communication needed between HMB programs and states
-
1. Little, if any, evaluation of current cooperative budgets
 2. No formal agreements on audits, reviews of how cooperative budgets are spent
 3. Allowing HMB programs to send \$\$ around agreements

APPENDIX E

Question 4: *List 3 things that would make Cooperative Agreements more effective.*

STATE CONVENTION RESPONDENTS

none, really

1. Give regional representatives more authority
2. Use electronic reporting exclusively
3. Increase focus on baptisms, church starts in Cooperative Agreements
4. Involve Dr. Reccord with executive directors

1. Better understanding by entities of roles/expectations
2. Give states greater "say" in designing agreement
3. Empower Regional Coordinators to manage the process

1. Revisions more frequently
2. More visits by Coordinator
3. Long-range commitments

1. Ability to shift new work funds around more easily
2. Allocate additional funds to cities a million or more in population
3. Program heads meet with executive directors and state missions director every 3 years and go over needs

1. Simplify
2. Delete duplicate administration of funds
3. Initiate from states to HMB

1. To reduce the numbers of hands through which an item must pass

1. Larger percentage for program and personnel support
2. A better attitude of cooperation with staff and programs
3. A short time for turn around on requests

1. Fewer layers at the Atlanta office to sign off on an agreed upon strategy and budget

1. Enforce the guidelines that the agreement calls for with HMB program staff
2. Put all field funding into the Cooperative Agreement process rather than piecemealing the funds through 3 or 4 channels (i.e., Day Funding, NBBS, etc.)
3. Send the money to the states without all the hassle and paperwork

Once a month receive $\frac{1}{12}$ of agreed upon budget negotiations

1. Divide it into $\frac{1}{12}$ and send
2. Asking for a report for next month

1. Make simpler, broader agreements with more initiative and latitude in the newer states
2. Reduce the "lag" time between new initiatives and start-up money
3. Allow and create a "council" of newer state executives for honest feedback in shaping their destinies through the agreements.

In addition to contacts by HMB Regional Coordinator, more dialogue should take place between HMB president and state executive directors

1. Put more effort to develop indigenous work in state conventions and associations
2. Continue local supervision of missionaries
3. Maintain a nation-wide strategy with emphasis on reaching cities with strong churches

1. Reformat the document
 2. Customization...state by state
 3. Make every effort to "flesh out" the document in our day to day working together...make it come alive
1. Make them more dynamic, less static documents
 2. Make sure both NAMB and state staff are conversant with contents of them for each convention. Renew annually
 3. If they are to be documents of accountability, then devise ways to make them so
1. Improved inter-office (HMB) communication between areas of work
 2. Greater flexibility in employment procedures
 3. LESS PAPER WORK
1. More frequent analysis of how they fit into a national strategy
1. Must maintain flexibility. We live in a fast-changing world. Budgets prepared even 2 years in advance see many changes
 2. NAMB staff must be willing to release money to new areas when old needs pass and new needs arise
1. Better communication
 2. Regular scheduled joint planning
 3. More effective evaluation and more regularly scheduled
1. Accountability
 2. Planning for results
 3. Customizing
1. Customize more thoroughly
 2. Cut down on paperwork and reporting
 3. Consider "block grants"
1. More mutual interaction to develop trust, joint strategies and cooperation
 2. When HMB (NAMB) holds national meetings with SDOMs etc., have time for mutual sharing and strategy development rather than merely promoting latest program; listening on both sides will help
 3. Decrease amount of red tape and paper work (MAJOR POINT!)
1. Give more weight to state priorities
1. Selection of personnel is critical
1. Budget by general categories in lump sums to offer greater flexibility in responding to specific state needs
 2. Quicker turnaround on state funding requests (sometimes it is three months coming)
 3. Some discretionary funds would be helpful in responding to special association and church requests
1. More flexibility to shift funds as needed in light of immediate opportunity
 2. Increased field participation in budget process—perhaps through internet, etc.
 3. Assessment every 5 years to see the effects the Cooperative Agreement is having on the state convention in order to strengthen or reverse trends
- I frankly do not believe we need a Cooperative Agreement
1. Shorten the lead time on the details (I will submit a '99 HMB budget request almost at the same time I submit my '98 state convention request)
- Input and involvement of state staff (Iowa)

Make sure our new Regional Coordinator has experience and/or knowledge of a new work convention

Don't know. Not much thought has been given by me to this. The info from the Regional Coordinator/HMB is very valuable to us, but I don't know how to improve

I hope we will continue to listen to and respond to the "grass roots" in our planning nationally

Why mess with a good system?

1. Participation in national planning by state execs

1. Willingness to make adjustments as priorities and needs arise
2. Negotiate as partners

Make it possible to obtain new money without requiring a request from one section such as Evangelism to be the state's priority

1. Missions and evangelism are ultimately local issues. Cooperative Agreements must allow greater flexibility for states to implement strategy. Process has been weighted in favor of missions to the detriment of evangelism

More interactive planning model

1. Be more flexible with funding
2. HMB staff more pro-active with suggestions
3. Research/models on evangelism personnel needs/opportunities

1. Systematic monthly allocations ($\frac{1}{12}$)
2. Authority to use money as needed
3. Allow states to control own money

The agreements are fine and they are essential; there needs to remain opportunity to customize according to the state's needs; more opportunity to customize would improve the process

1. More customized by states

1. More 100% funding for weaker conventions
2. Put the administration of the agreement with program people at NAMB

1. Regional Coordinators in tune with missions ministries strategies
2. Periodic strategy updates that would include Regional Coordinators and NAMB ministry leaders
3. An accountability system that does not demand a full-time state convention secretary to support its paperwork

1. More specifically address the "partnership" aspects
2. Periodically review the Cooperative Agreements with HMB personnel

1. A partnership of ministry goals and implementation defined procedurally, would help

1. Consistent interpretation
2. Annual evaluation
3. Flexibility in Regional Coordinator negotiations

1. Frank discussion of agreements
2. Divide the budget into 12 equal amounts and send to state convention monthly
3. Make them more flexible in fund use

1. Reduce the number of hands through which priorities pass

1. Require strategic planning between NAMB and each state
2. Recognize the participation of the sponsoring convention and the local association in the chain of events, planning and resources
3. Build in more flexibility in operation so that plans can change as local situations change
1. State should know how much new money that would be available
2. Then work the vice presidents and coordination to where and how the money would be spent
3. Have some money available for special projects that might arise
1. The cooperative document ought to deal with broad areas of funding to allow for faster response to changing needs within the state
2. States are left with very little leverage for negotiation without appearing to be non cooperative
1. Allow for a grouping of priorities
2. Simplify process by which states receive cooperatively negotiated funding
1. Make them more dynamic, less static documents
2. Make sure both NAMB and state staff are conversant with contents of them for each convention
3. If they are to be documents of accountability, then devise ways to make them so
1. Customization for a state's context
2. Funding priorities from states and not national agency
3. Quick response to new opportunities in a funding year already agreed upon
1. Give Regional Coordinator more freedom to work with state conventions in making line item budgets fit state convention needs and goals
2. Give more flexibility in rearranging dollars for being more strategic
3. Free up coordination to respond quickly to a "once in a decade," etc., window of opportunity for a special mission need or project
1. Provide $\frac{1}{12}$ funding each month—justify at end of year
2. Require less paperwork to do board actions—already agreed upon anyway
3. Provide better methods of evaluating personnel
1. Put more money where we have the greatest population of unchurched people
2. Regular evaluation and adjustment
3. Consider the areas with greatest possibility for accessing needed funds

HMB RESPONDENTS

1. More bottom up planning
2. Regional Coordinators that live regionally
1. HMB program leaders that commit to agency-wide goals rather than only their program
2. Better communication of state priorities to HMB staff so they can be more tolerant of delays in the implementation of HMB staff desires
3. Educate state and HMB staff in how agreements are negotiated
1. The need for both the HMB and the state convention to stress the importance of the cooperative relationship
2. The assurance on the part of planning that all HMB programs and state leadership have adequate input
3. The development of a training process for those who are new to the cooperative agreement

1. HMB representatives to state conventions explain plan to the people
2. States should be required to pick up additional percentages often
3. The Coordinator should meet annually with state board to explain the HMB view of the Cooperative Agreement—answer questions
4. The HMB should see the agreement as the showcase of cooperation

1. States try to bypass
2. Limits creativity
3. HMB staff seeks to violate

Make sure the Regional Coordinators reflect the viewpoints of NAMB and not just the viewpoint of the state convention or their own.

1. three-men planning teams instead of one Coordinator
2. HMB be for resource and catalytic
3. Less paperwork

1. Flexibility
2. Better and more frequent communication between state program people with agency program people, with Regional Coordinators
3. A project review process: a state strategy planning session (in depth) about every 2 years which evaluates effectiveness of projects, personnel and costs
4. Streamline budgeting priority system
5. Eliminate several up-line approvals once budget agreements are in place

1. Needs to address a more thorough plan of strategy development/budget determination process
2. Needs to include the participation of Mission Board program VPs along with state mission/evangelism lead persons (this is beyond Coordinator and executive director)
3. Needs to address personnel issues such as process for recruitment/selection (rather than just have the Mission Board to process the state's selectee)

1. Provide a way for the field servicing units of both parties to take responsibility for the agreement, both construction and results
2. Zero base budget everything possible every year
3. Let them reflect strategy of churches, associations, conventions more than NAMB strategy

1. Create flexibility in use of funds as priorities shift
2. Involve more HMB personnel and state personnel in the process; HMB program personnel have no impact on use of funds related to strategy
3. Send $\frac{1}{12}$ payments each month; eliminate the requests system; once we've agreed, send the money; also allow flexibility for adjustments during the year

1. Pool of "hot" money for special needs
2. Short-term projects
3. Program area involvement

1. The most important ingredient is trust. That will improve with good relationships. Everything should be build on a spirit of partnerships
2. The need for the entities of the SBC to demonstrate cooperation to Southern Baptist churches. Once cooperation is destroyed on any level, it is the beginning of the end. This cooperation should be exhibited around common goals and priorities for the state as well as the nation
3. For the HMB and state conventions to each lift up the other entity in publications and in personal presentations. This would reveal a mindset of Kingdom-building and not turfism.
4. Include select DOMs and pastors in the NAMB/state Cooperative Agreement meetings

1. More detailed information (i.e. "understood" policies of agency, guidelines involving funding)—stronger statements
 2. Accountability and evaluation
 3. Expecting Cooperative Agreements to be upheld
1. Clear understanding—set forth responsibility of state and HMB
 2. Provide appropriate way to address disagreement (process)
1. Greater emphasis on true partnership
 2. Educate staff of state and NAMB as to content, purpose, and authority of the cooperative agreement
 3. Remove ability of NAMB staff to use money as a club over the head of state staff to keep them in line
1. Develop an evaluation process for personnel, programs, and projects
 2. Help communication between HMB programs and states
1. Priorities and funding more mission specific—less funding of general items
 2. HMB administration and staff honoring and not bypassing agreements

APPENDIX F

Question 5: *If there is not an adequate process to evaluate Cooperative Agreements, what suggestions would you make?*

STATE CONVENTION RESPONDENTS

Give the opportunity!

Coordination has done this—however, the President rejected our instrument and would not evaluate the effectiveness of the funding, etc.; To get evaluation; let a TASK force led by the Regional Coordinator develop an instrument for evaluating the work—THEN, USE IT!

Strategy for winning North America to Christ needs to include allowing and creating a “council” of newer state executives for honest feedback in shaping their destinies through the agreements with interaction and support from the old-line sates

Evaluation done at least every five years with NAMB president and state executives and NAMB trustees

Give the Regional Coordinator empowerment to shape the document as he consults with state convention leadership...plan to spend more time looking at/shaping the document during at least one meeting with state leaders and Regional Coordinator. Have some time to discuss (annually) with NAMB president and state executive directors.

There is certainly some evaluation going on (i.e. annual growth review) but I think it could be improved. Perhaps clearer (joint) goals of what is to be accomplished and regularly (yearly?) scheduled evaluation by program area

Regional Coordinators need the authority to evaluate the effectiveness of Cooperative Agreements

The regional representative needs more authority

1. More mutual interaction to develop trust, joint strategies and cooperation
2. When HMB (NAMB) holds national meetings with SDOMs etc., have time for mutual sharing and strategy development rather than merely promoting latest program; listening on both sides will help
3. Decrease amount of red tape and paper work (MAJOR POINT!)

Budget should be a servant of strategy—not a separate matter entirely. Focus on evaluating the strategy

NAMB and state conventions need to engage in joint strategic long-range planning. Goals should be jointly arrived at. Little or no evaluation exists

Focus on results

It is not adequate since it does not take program people into the loop; they need to be the ones to evaluate, both state and NAMB program people

Have program vice presidents review the agreements once a year during routine schedule conferences

Please—no “one size fits all” proposals. I’m not sure what your actual question is here. Evaluating “implementation”—what do you mean? Any Cooperative Agreement with Florida must be customized to Florida

There needs to be an annual planning session and goal setting session, including NAMB staff people and state convention staff people

Evaluation criteria need to be determined in advance of funding and fully understood by states

HMB RESPONDENTS

It is better now than 3 years ago but still room for improvement; need more openness with administration on this matter

1. Teach HMB program personnel to respect the negotiated process
2. Better inform state and HMB personnel about cooperation vs. unilateral manipulation

The HMB administration must establish a procedure for an annual review of its effectiveness in each state

I marked “no” because evaluation seems now to be too subjective. It is not clear whether the problem is evaluation or implementation. We need some objective data-type evaluation tools.

Needs to include program persons from HMB (NAMB) and state convention to participate in the review, evaluation, affirmation or revision of agreement and its implementation

Develop a process that combines zero base budgeting, MBO (management by objectives), TQM (total quality management), and put this in the hands of the field servicing units of both parties

Annual review by representatives from each section

Better reporting, planning

Technically, the HMB can account for funds sent to states. The documentation process is good. Difficulties arise when HMB priorities and state priorities are on a collision course and neither group considers the other person’s priority. The HMB needs to develop more of a service mindset, especially with a quick response/turnaround time

Regional Coordinators [should become] more involved in specifics for state-funding, financial info, conferences, where the state has been and where state is going—Regional Coordinator should know ALL

To provide Regional Coordinators authority to bring disagreeing parties to a mutual agreement within the Cooperative Agreements; there are and have been people from states and HMB that abused the process and system

Empower Regional Coordinators to do real evaluation of programs and projects on a regular basis

The process is implemented well; the work results are not evaluated well; an evaluation instrument is needed

1. Up-front agreement on audit or balance sheet reviews
2. Specific assignment to Regional Coordinators for evaluation with executive management support

APPENDIX G

Question 7: *In what ways could the role of the Regional Coordinator be improved?*

STATE CONVENTION RESPONDENTS

Just give Alaska another Dean Doster!

He should have administrative oversight of the agreements rather than being an arbiter or expediter

Empower Regional Coordinators to manage the process of change

Empowerment; availability

Program heads meet with executive directors and state missions director every 3 years and go over needs, or each time the Regional Coordinator visits he could bring a couple of department heads with him to discuss their area of work

Let him be a decision maker, not a mail carrier

None that we know!

Permit the Regional Coordinator to negotiate more. Release some of the administrative restrictions under which they have worked.

Continue to have those who are serving in this capacity culturally sensitive to the needs of the states to which they are assigned. They should have enough missiological background to assist in implementing an evangelism and church starting strategy within the context of the local culture

1. By raising the level of their role in the eyes of the ministry team leaders; if they are legitimate then make folks live by the guidelines
2. Make sure the Regional Coordinator is functionally representing the President of the agency and that everyone understands this

It is working great

We have been pleased and well served by the responsiveness and service provided by the Regional Coordinator

Help them become strategists for helping to bring North America to Christ

Raise the level at HMB (NAMB)

Very effective "as is"

They understand budgets and priorities as a process; they need to be stronger in strategy planning and knowledge of needs and challenges of individual states

Give the Regional Coordinator empowerment to shape the document as he consults with state convention leadership...plan to spend more time looking at/shaping the document during at least one meeting with state leaders and Regional Coordinator.

Reduce work load by covering fewer states. In addition to paper communication let him/her sit with NAMB and state staff over a period of time to really catch dreams and ways of getting to them. Continue to let this person be advocate for state conventions with NAMB staff. There should be the ability to plan beyond one year.

Clarify role of Regional Coordinator and relationship to program people at the HMB

Have no suggestions; very satisfied; they have always been advocates not adversaries

Program leaders will need to be more involved with Regional Coordinator for more joint planning and evaluation

Relate more directly to the president so as to be in a stronger position to implement Cooperative Agreements—otherwise it will be “business as usual”

Be given more authority

I am very pleased with the current arrangement

1. Greater involvement with section personnel in strategic development alongside the state personnel
2. Regional Coordinators do excellent work with budget coordination; there is room for growth with overall strategic development

At first more time spent in state

The two Regional Coordinators with whom I have worked have been a tremendous help, resource, and support to my work!

The two we have had made a difference in our state. They were more than just Regional Coordinators—they were partners

Is the role of the regional coordination personality driven—Palmer vs. Garrett—The Regional Coordinator should have a significant amount of experience in contextualized mission. The decisions by the Regional Coordinator may significantly influence the character of Baptist witness of a state convention. Each Regional Coordinator should use this power with great wisdom and insight

The original theory was sound—however there’s a need for totally re-thinking how best to facilitate HMB/NAMB and state cooperation

Make sure the Regional Coordinator has experience and/or knowledge of a new work convention

Don’t know—it works well with us now

It is working very smoothly from my perspective

Keep them informed and allow them to be candid about the work of the HMB/NAMB

Must be willing to be our liaison, express our needs to the Board and be given some freedom to negotiate for the Board

This is not a complaint against a person but rather the process. I think Regional Coordinators are not necessary. Let program divisions work directly with counterpart persons at HMB after having budget requests approved by state executive director

The RC needs to spend more time in his geographical area. He needs to seek out and spend time with HMB-related personnel on state convention staffs

1. Given more authority
2. Stronger planning involvement

Be pro-active about possibilities; where God is at work, what can be done, creative approaches

The role of the Regional Coordinator can be improved by spending more time in the state to gain a broader understanding of the work taking place there

Give him authority to finalize negotiations without having to call Atlanta

1. Jim Coldiron has done an excellent job for me
2. I sense, on occasion, that some program personnel at the Board have not been completely happy about the role of the Regional Coordinator; some of the program personnel seem to prefer handling the negotiations; any such tension needs to be relaxed

Do away with the Regional Coordinator; they duplicate the program people at worse; the line between program people and Regional Coordinator is fuzzy at best

Make him a part of the NAMB—state convention funding AND strategy development process; for example, we have regular strategy planning with the HMB program leaders—the Regional Coordinator is not in these meetings

Seems to need more authority and/or coordinating at the HMB with the senior program leaders

The Regional Coordinator needs to have authority to negotiate budget issues to address needs which are windows of opportunity which may not have surfaced in the long-term procedures

Allow him more flexibility in meeting unique and constantly changing needs. I would be happy to illustrate—in detail!

More frequent meetings to discuss needs with program leaders

None

Lead in more planning of goals and action planning, and working with the NAMB staff and state convention staff to plan and review accomplishments

1. Periodic tours of states they relate to for orientation of needs and successes
2. A need for regional Regional Coordinator to be acquainted with priorities of HMB divisional priorities

Allow more time for field evaluation/negotiations of priorities. As it is now, the Regional Coordinator has dinner with state executive director, then the following morning Regional Coordinator and executive director sit with program staff—but decisions often are already made prior to that final meeting

Presently the Regional Coordinator is very accessible and committed to partnership. I have no suggestions for improvement

Reduce workload by covering fewer states. In addition to paper communication, let him/her sit with NAMB and state staff over a period of time to really catch dreams and ways of getting to them.

Continue to let this person be advocate for state conventions with NAMB staff

1. Empowered to make decisions without having to work through layers of the institution
2. Start from perspective of states rather than from that of national agency
3. Higher accountability to the states such as knowledge of state's mission context

Spend more time in the region, maybe live there

More time spent with our staff in cooperative planning

1. More time in state for planning/dialogue
2. Work out conflict between Regional Coordinator and HMB program leaders
3. Give more freedom to Regional Coordinator to set up ways to reduce paperwork and hours spent in receiving HMB funds

Give that person more latitude in making needed changes

Live in region

HMB RESPONDENTS

Select new Regional Coordinators with integrity, i.e. patience, tolerance, honesty, unbiased about programs or state leaders, committed to HMB goals

HMB VPs needed who understand the essential elements of cooperation between autonomous Baptist entities

Providing an adequate number of Regional Coordinators (4 or 5) and by providing a more effective feedback process

Program directors need to view the Regional Coordinator as a friend and not someone who is another layer of administration. He must have time to think about the future in long and mid-range planning and not be bothered with supervision of any personnel. He must become the best friend of each state executive secretary

1. Programs/Ministry do long-range planning
2. Regional Coordinator communicate plans developed
3. Better relationship with HMB staff

Let them stick to negotiating budget based on viewpoint of the persons responsible for implementing the ministries. I think that the responsibilities did not need as many Regional Coordinators as were active. They worked hard two periods of the year, but spent other time messing around with program responsibilities. They inadvertently became seen as the source from which all blessings flow.

1. Only work on budget—let program representatives do basic planning

The role of the Regional Coordinator is very important. Since his work is highly relational, he should be given a great deal of flexibility within the parameters of budget priorities, etc., in each state.

1. Clarification of negotiation responsibilities
2. Communication with program leaders (HMB/NAMB) and to persuade state to involve state program leaders in decision process

1. Train the Regional Coordinator to manage the process of the Cooperative Agreements but not the issues and outcomes of the agreements
2. Be sure the Regional Coordinator does not make decision for these who have to live with and be responsible for the decisions of the agreements
3. Require program/project leaders and Regional Coordinators to work together extensively and in team ship
4. Let the evaluation of the Regional Coordinator's work be supervised/evaluated more by the field servicing units than the management units
5. The Forum Process used by Metro Thrust and Mega Focus City have been very effective in developing teamship/ were such a process the primary one used by the Regional Coordinator, it may provide information more holistically strategic than politically expedient; it may also provide information reflective of the team rather than the biases of the executive

Use a team approach; a representative from each section, with Regional Coordinator as team leader

More contact with programs

Authority to act/decide

Better information/training re: current program needs/trends/emphases

More regular, on-going communication with ministry leaders and Regional Coordinators initiated by Regional Coordinators

1. Be involved in state at deeper level than executive director, not to exclude executive director
2. Have authority over state funding exceptions to guidelines and policies
3. Be involved in states at more levels than just funding—know what is done with funds and why

1. Provide the Regional Coordinators authority to evaluate program/ministry areas
2. Enable Regional Coordinators to review a trial implementation of funds by states—a quarterly or semi-annual report

Elevate the position of Regional Coordinator to where he (or she) has the authority to implement, monitor and protect the integrity of the Cooperative Agreement without intimidation from program leaders or vice presidents; build strong lines of communications between Regional Coordinators and NAMB president and state executives

Be involved in evaluating the work in the states; evaluation needs to be done by an objective person; it is hard to evaluate yourself

1. More direct relationship to president or executive vice president
2. Ability to manage transfers, etc. to agency priorities

APPENDIX H

Question 8: *If the Regional Coordinator does not have the necessary authority to implement the agreements and insure the HMB abides by them, please explain.*

STATE CONVENTION RESPONDENTS

Staff does not support Regional Coordinator

Always, most always needs to "check," seems the supervisor does not trust the Regional Coordinator

Not a decision maker

Still dependent on approval of superiors and cooperation of HMB department directors

They may...but it doesn't feel like it. The Cooperative Agreements are not high priority in discussion with Regional Coordinator...can he implement needed change?

The vice presidents and their staffs need to honor the process of agreements negotiated by the Regional Coordinators with state leaders and vice versa by state leaders

Some areas in HMB seemingly unaware of what the Regional Coordinator has done

He makes no major decisions unless he contacts supervisors that relate to specific request

Uncertain as to what involvement Regional Coordinator has in negotiation

Must always return to Board for decision and to division or department directors; it is usually just shifting funds

Some departments apparently do not read the Coordinator's reports; it sometimes takes 6 to 8 months to see changes made which had been negotiated

Personalities seem to affect implementation at the national agency

1. Is Regional Coordinator expected to remind HMB president when one-way decisions are made by him and announced without state input?
2. Have never seen a letter of reprimand from Regional Coordinator to HMB staffer who comes into state for planning, other meetings, without informing state—breach of Cooperative Agreement.

His authority is checked by program directors and the Board

I have seen the HMB president unilaterally violate the agreement over the protest of Coordinator and state executive

There is some question about that; it seems that his hands are tied on occasion

HMB RESPONDENTS

In most cases yes, but in negotiating with top level management, in the states, there are times, when added authority is needed

Unclear about the area where decisions are made about the agreement. Also the Regional Coordinator needs to confer with HMB program leaders on their perspectives of the agreement being implemented

Not aware of any authority

The role of the Regional Coordinator should be refocused to reflect the Regional Coordinator in an ambassador role from NAMB leadership and all the work issuing out of a partnership mindset

Regional Coordinator (and maybe state) thinks Regional Coordinator has authority. It's difficult to be good guy (bringer of money) and a tough guy (when there's a problem) at the same time

Currently the Regional Coordinators' authority does not allow them evaluation of HMB programs, ensuring compliance with Cooperative Agreement

The Regional Coordinators' authority depends on the active backing of the Vice President, Planning Section; without that strong backing, other vice presidents can ignore the Regional Coordinator

APPENDIX I

Question 10: *If there is a better way than the current Cooperative Agreements for the new North American Mission Board (NAMB) to partner with state conventions in order to do evangelism and church extension, what do you suggest?*

STATE CONVENTION RESPONDENTS

More active role in the strategy development in the state convention; the Regional Coordinator should be able to assist in strategy planning! The state's one man to relate to in these areas—programming and budgeting

Dr. Reccord, executive directors and Regional Coordinator should meet annually—if the head cheese is involved, the partnership is secure and trust is enhanced

If we can make multi-year commitments for Mega Focus, why not for states? We need to plan 3 to 4 years at a time so state budgets and NAMB budgets can work together!

1. More flexibility to incorporate HMB money and personnel to our strategy
2. More analysis to be sure we are all involved the same way in a national strategy

Implement some of the changes suggested but keep cooperative arrangements to prevent duplication and even competition

Allow the state to retain the money that normally comes to them from the HMB to be used by the state. This applies to Florida. It would not apply to a state that received 95% of its program support by HMB; a different set of guidelines is needed for different states

Consult the state staff prior to meetings

Regional Coordinators have territory that is too large. They can't possibly spend time effectively in the field

More involvement of state staff in planning process

1. HMB be more pro-active as to possibilities instead of protecting funds; What's working and where and could it work here
2. Evangelism has been omitted from the priority thinking and possibilities both at the HMB and state conventions
3. Separate funds for evangelism so the requests are not always in competition with missions, ministry and church extension

Do Cooperative Agreements through the program people at NAMB

Flexibility in resourcing. I would be happy to be specific in at least two areas if you are interested

Negotiate a more flexible Cooperative Agreement budget plan which will respond more quickly to changes in needs and mission opportunities/ let each state decide the priorities and where the funds will be sent

Make the process more of a planning process than a financial arrangement

More money available for more qualified church planters in strategic areas

NAMB can trust the state conventions to do adequate planning and execution of plans to the extent of committing the total cooperative funds and sending 1/12 of the total funds each month. A reporting system can be utilized, of course

Strengthen process to make genuine partners. Don't throw out the baby with the bath water, but make more dynamic, less legalistic

Block grants or negotiated percentage of SBC funds given by churches in a state returned to the state

Take a look at the needs in a given state and help that state to receive back from NAMB what it will take to provide adequate budgeting; this will help states by not forcing them to retain a larger percentage of CP in the state

More on the field planning with states—by Regional Coordinators that live in the regions—instead of annual visits

HMB RESPONDENTS

Seek to implement that part of the Cooperative Agreement that permits the Board

Do more to work with states to meet their needs in their situations, instead of pushing an HMB or NAMB agenda

A state strategy planning session (in depth) about every 2 years which evaluates effectiveness of projects, personnel and costs

Need to address a stronger strategy development with both state and NAMB. This strategy development needs to be correlated to budget development and personnel deployment

Develop a concise national strategy for evangelism and church extension which is flexible enough for state conventions to buy in both strategically and pragmatically for state and national missions. The most critical piece of this is to package this so that the state convention, associations and churches get naturally involved in this as an outgrowth of their own strategies to accomplish world missions; this may necessitate an initial planning group or process in some conventions different from the one currently in place; for instance, is there a way more explicitly to involve associations and churches in the process, i.e. role of board members, associational reps, etc.

Joint program planning; Flexibility; "R&D"; "Seed Money"

1. Cooperative partnerships that identify ministries states can do, ministries NAMB can do, and ministries which overlap both for the purpose of Kingdom-building.
2. There needs to be increased communication between state evangelism, state executives, and church planting leaders with the corresponding leaders of NAMB
3. There may be a need to have Cooperative Agreements with some associations apart from agreements with state conventions, but in keeping with agreed upon priorities

National strategy is important from agency viewpoint, but action plans are where agency is involved—Cooperative Agreement just be "action."

There is probably always a better way—I am not sure what it is; Regional Coordinators need to get more involved with the states and NAMB program staff in Strategic planning

APPENDIX J

Question 11: *If there is a better name for the relationship between NAMB and state conventions other than "Cooperative Agreements," what do you suggest?*

STATE CONVENTION RESPONDENTS

Cooperative Partnerships

Cooperative Agreements sounds close to cooperative program—perhaps something to communicate, Great Commission Partnership would be better

Partnership Agreements
Covenant of Partnership

Partnership Agreements

Strategic Partnership Agreements

Covenant of Cooperation

Mission Partnership Agreements or Mission Partnership Covenants

Joint-Partnership Agreement

Focus on what you want to see happen (results, outcomes)

"Partnering for Growth"

"Growth Agreements"

"Partners for Growth"

"Agreements for Growth"

Maybe: Covenant Agreement or Partnership Covenants

As far as I am concerned "Cooperative Agreement" is fine; but with new beginnings, the document/agreement may be given a new name

Perhaps "Covenant for Partnership"

Partnership Agreements

Partnership Agreements

Partnership Agreement

Partnership Agreements

HMB RESPONDENTS

Both agencies partner rather than "threaten"

Perhaps; however, "Cooperative Agreements" is not offensive to me and if used as a technical term by a limited number probably would not need to be changed. I suggest Strategic Partnership Planning/Strategic Missions Resourcing

1. Leadership Covenants
2. Partnership Agreements

State Partnerships

Joint Strategy/Action Plan

Strategic partnerships, ministry-based partnerships, church-based partnerships

APPENDIX K

Question 12: *Do you have any additional information regarding Cooperative Agreements that you would like to share with the Study Group for Cooperative Agreements? If so, respond below or attach an additional sheet.*

STATE CONVENTION RESPONDENTS

Keep the Cooperative Agreements

Thank you for the opportunity to input. I am most concerned that the "Black" and "Ethnic" workers continue in crossing (helping) language and cultural barriers. We have been improving in these areas—it would be a shame to lose this thrust in a such a multi-cultural/language society!!!

Without clear understanding with the state conventions, I can see a diminishing role for NAMB. The expertise of the state convention is needed. They have developed a corps of leaders who help to shape the national strategy

In old line states who send more than they receive: Make a distinction between "state missions and missionaries" = Those who work in boundaries of the state; and NAMB missionaries = those who are supported by the NAMB and old line states in areas where state missionaries are not possible

The biggest problem is that Larry Lewis would make agreements in good faith through coordination then he would allow program staff to violate these agreements without any discipline or effort to explain the importance of keeping our word; Either have no agreements or make everyone live by the agreements; agree to what both parties will do—**THEN DO IT**

Make request for money more simple and a little easier to process

The Cooperative Agreements are serving well in the functional relationship between state conventions at HMB and should not be changed; they create a climate of communication, cooperation and trust

Strongly appeal for a strategy that includes input from everybody involved. We can make a greater impact on America for Christ. Regional Coordinator's time in the field does not allow for a sufficient understanding of the strategy or methodology used in each state

Talk with more executive directors; they have not had much input in the process

It is imperative that Cooperative Agreements remain a vital part of the partnership between state conventions and NAMB. Without such agreements our entire cooperative "system" could be in jeopardy.

Thanks for asking—we are praying for you as you study and make recommendations on this vital issue.

The possibilities for improvement are now! This is the way to produce a national strategy for missions and evangelism to advance across the U.S. and North America.

During the transition to the North American Mission Board, the absolute key to success is the relationships between NAMB and the state conventions; it is a two-way street; the Cooperative Agreements provide an element of stability in a highly stressful environment; it

is better to "fine tune" this document after trustful relationships have been developed than to heighten the level of questioning at this point. Key is for these to be Cooperative Agreements, not suzerainty treaties

The ITF should examine incidents where Cooperative Agreements were either non-existent or violated by HMB. Such would be efforts of direct mission in the past. These should be examined in light of long-term effects on Baptist work and length of dependency/outcome of the ministry due to outside resources

The newer state conventions need the Cooperative Agreement to help us; our convention of 200 churches has 3 Mega Focus cities and over 13 million people—we need continual support from HMB/NAMB

Do consider the growing ethnic work as a strength to our convention and be included in the process

It is essential that these be kept. However, the system or funding priorities needs to be evaluated; funds should go where the opportunities are, not to prop up organizations in sparsely populated areas of the country

Avoid duplication; program people visit the fields of work and know the work first hand/ the Coordinators visit the state convention office and know the work on paper

1. Cooperative Agreements are central to our partnership
2. The Coordinator is a valued and needed of our team
3. Negotiate strategy with program/ministry bodies in a meeting that includes the Coordinator and we'll all do better work
4. Maintain a very high level of accountability for the use of funds, but simplify the process

I have been quite satisfied with the document as written on paper

I am a supporter of the cooperative missions approach to missions established by Southern Baptists. I am a product of Southern Baptist missionaries from my childhood. I believe cooperative missions is the only logical approach for Christian missionary work. I hope cooperation stays in our philosophy of missions.

Customize; customize; customize Cooperative Agreements. There can be no other way if you have a Kingdom bent/view

I believe the Cooperative Agreement concept is good in NAMB's and the state planning together for cooperative/partnership work; having Regional Coordinators is an effective way to negotiate and effective mission strategy implementation plan

I have served as Interim Director of Missions for Hawaii Baptist for 14 months and I have found the system and the Coordinator worked well for us. With a longer tenure and more experience I might have more specific input

----- *The following is from one questionnaire:*

Since I have been involved with Cooperative Agreements since 1960, I have developed some opinions, some experience and some commitment to this kind of document.

It is my feeling that we really cannot do our best work as Southern Baptists without some kind of working relationship and partnership between the new North American Mission Board, the states, the associations, and the churches that sponsor mission work.

I certainly do not want to go back to the days when we did not have Cooperative Agreements and Southern Baptists were duplicating their efforts all over the Southern Baptist Convention. I am probably one of the few people that is still active in mission work that was around then Cooperative Agreements were first being implemented. So I know a lot of the listing first hand.

(from a letter to Dr. Larry Lewis, attached to this questionnaire)

One of the largest problems we have in Southern Baptist Convention life today is that very few pastors, people, or convention leaders know anything about Southern Baptist history or the pilgrimage that has brought us this far with the Lord's work.

I am convinced that we don't have to keep on doing things the same old ways, but I also know that you have to have something better to replace it with if you are going to change it.

If some of our present leadership, including some of the state executive directors, only knew what it was like in the earlier days of home missions and how difficult it was to get anything done because of lack of cooperation, they would be working diligently to preserve and improve cooperation in any way that they can.

Before we had the Cooperative Agreements between the Home Mission Board and the states, we had what we called Direct Missions. In Louisiana the Missions Department was called Direct Missions until I came in 1977. Direct Missions was a name for a philosophy that basically said, "I am responsible for the missions work in this geographical area, and I will do all I can with what resources I have, but I am not going to plan with or cooperate with anybody else to get the mission work done." As a result, we had limited approaches to mission work, and very limited results and a lot of duplication.

There were many cases where the Home Mission Board and states were trying to do the same thing in the same area and actually were in competition with each other.

In regards to the Cooperative Agreement today, it really is a planning procedure, and certainly is not dictated by anybody as to what can and cannot be attempted in any area of territory, programs, or procedures.

I really have a big, big problem with people who say we send money up the line to the denomination and they keep some and send us some back. That is not the case, because all giving is from individuals who are trying to be faithful to the Lord and His instructions about our stewardship. Actually, any funds forwarded from the individual carries with it the sacred trust to be used to the highest and best advantage for the Kingdom of God. Any person or persons who have any input to how those gifts are used should prayerfully seek to find the Lord's leadership—and will before a single penny of those funds is spent.

My latest attempt to explain the Cooperative Program is that approximately \$325 million is given by the churches of the Southern Baptist Convention to the Cooperative Program. It is expected that some of those funds will be retained in each state convention/fellowship to assist in operating all of the programs, institutions and activities of that particular state. Then, all of the states combined send approximately \$138 million to the Southern Baptist Convention for the work of Southern Baptists, including the Foreign Mission Board, Home Mission Board, seminaries, and other agencies.

Any funds received or not received by the Southern Baptist Convention are for the entire national programs of Southern Baptists, and become part of the whole. There is no such thing as giving some and getting some back. All of the agencies spend some moneys in the states, although the Home Mission Board is the only agency that works on the basis of cooperative planning with the 42 state entities.

If a state convention (any state convention) decides that they don't want to work with the Home Mission Board, then that is their decision, but Southern Baptists, including the ones from that state, expect the Home Mission Board to be engaged in missions in all areas of the United States and its territories.

1. There is too much time spent in getting the \$400,000 returned to Tennessee
2. Give us the funding agreed upon and hold us accountable for year-end report
3. Empower us to know how best to spend funds in Tennessee
4. Accept our state's strategy as being viable—fund along its scope
5. Treat Tennessee as equal partner, not as junior

The Cooperative Agreement is a great tool overall. It should be retained. But above concerns are genuine. By the time you figure up man-hours, it costs too much to receive our little bit back. This is not good stewardship.

There really needs to be more sensitivity to the budget needs in states and less criticism when states have to adjust percentages because there is no cooperation with HMB or NAMB

HMB RESPONDENTS

It is important that those who will plan and implement the new organization NAMB strategy recognize that time and patience must be exercised. Change is necessary, but don't fix it if it is not broken

The word "Coordinator" has lost its meaning. A better name can be coined for the Regional Coordinator. Dr. Rutledge had a real fix on "HMB Planner" with good reason. I think that success rides on good planing. The Coordinator is also a budgeter and evaluator. Where current HMB programs are not producing, the Coordinator needs authority to call the useless effort into question for decision. Best wishes to the committee and administration in your work!

The Cooperative Agreements are the basis for a unified national strategy, serve as the basis for responsible stewardship, provide the needed funds for otherwise "unfunded efforts," etc.

Voluntary cooperation has always been the strength of SBC missions; I hope whatever is done at NAMB will be a ministry of coordination and support to those who really do missions

Cooperative Agreements are necessary to function in partnership with state conventions. There is a need to recognize differences in state conventions according to categories of development. Categories such as 1) old-line state conventions, 2) mid-range emerging conventions, 3) newer, struggling conventions, and 4) Fellowships

1. Accountability needs to be addressed, in the utilization of funds, in the use of personnel
2. Need for states to have greater ownership of jointly appointed personnel it is both our "problem" and blessing
3. Address personnel selection where both participate
4. Cooperative Agreement meetings make sure state program leaders participate

At this time I think that the more that can be done to serve the churches, associations, and convention the better. Let's avoid the appearance that NAMB is trying to tell churches, associations and conventions what to do; let's project a service oriented leadership motif and strategy

1. Have "regional" meetings of states and program (NAMB) areas
2. Program orientation for Coordinators, especially in light of greater area of NAMB responsibility
1. One of the conflicts—who can communicate with and respond to the churches?
2. More of a quick response to requests—no more than two weeks
3. A new system which allows the overlap of several states in targeting a key area/ministry (e.g. NYC/Northeast US/Mississippi Delta)
4. The financial response system needs to be updated so that once funds are approved they can be dispersed to churches or states within a few days or months. (May need to eliminate Board Actions for budgeted funds that have already been approved by the Board.) For accountability, Board members can have a regular review of all dispersed funds without hampering the disbursement of funds
5. NAMB staff members should be empowered to make quick responses to state requests and held accountable for all funds dispersed

Several statements in present Cooperative Agreement are on paper only: 1. funding paid upon receipt of documentation (none required); 2. moving personnel provided by local forces (usually HMB at 100%)

It is the presence of Cooperative Agreements, and the sense of trust they bring, that has allowed Southern Baptists to make the advances in home missions we have made

The Cooperative Agreements have been very effective

Cooperative Agreements, cooperative budgeting and cooperative program are all tied together very closely—and they are fragile and could easily deteriorate if great care is not taken in change

APPENDIX L

Miscellaneous Information Provided on the questionnaire in response to closed-ended questions.

Regarding Question 1: *How effective are current Cooperative Agreements in developing a partnership between state conventions and the Home Mission Board (HMB) for doing evangelism and missions?*

[somewhat effective] The original purpose of the Cooperative Agreements was to develop a uniform strategy for missions in the Home Mission Territory. It was intended to provide input from the Home Mission Board into state convention planning and input from state conventions into HMB planning. The result was to be a uniform strategy so that when people saw Church extension, for instance, they would see the plans carried out to be similar from one state to another. Naturally, the variations would reflect the differing needs, cultures, etc. from state to state.

Gradually the state convention strategy has become the determiner of what ought to be done rather than a coordination of the two viewpoints. This is because the Coordinator began reflecting their own concept of strategy rather than the persons who were the experts on program strategy, the program leaders. They also began to represent the state convention back to the HMB rather than the HMB to the state convention

Partnership relationships are very good—process and methodology needs evaluation

They are the only means available to “partner”

The modifiers raise questions. “Current” agreement could be improved

[very effective] The limitations are not in the concept. Possibly some improvement in the process would help.

The first HMB (Domestic Mission Board) executive secretary resigned because states would not cooperate. In 1871 the HMB employed 3 district men who functioned like Coordinators. The system works

[very effective] We need them

Regarding Question 6: *How would you evaluate the role of Regional Coordinator in implementing Cooperative Agreements?*

[somewhat effective] Focuses on “new money” for future years, less on ongoing strategies and plans

[very effective] I have worked in two state conventions with a variety of Coordinators (4). Each one represented Southern Baptist missions well

Just ask the executive directors in the state or Ernest Kelley at HMB

Gradually, the Coordinator chosen has less and less understanding of the missions programs.

[very effective] We are most fortunate in having such a knowledgeable and articulate person as Jim Coldiron. His caring demeanor is most appreciated!

[very effective] and very needed

[very effective] with Chan Garrett; Qualification: Florida has an outstanding working relationship with Chan Garrett. If the Coordinator is not "Kingdom" or "Ministry" sensitive the process could be abrasive and a nightmare

[very effective] gives a clear channel of communication in working with HMB—knows the process well and facilitates needed communication between state and HMB

[very effective] This can be noted in the fact that three of the last state executives elected have been former Regional Coordinators

They are all marvelous people, good counselors, but the "system" is cumbersome and time consuming—could be improved

[somewhat effective] Only the gap between funding and strategy updates keeps him from being very effective

Needs more latitude and power

[very effective] within current assigned responsibilities and authority

Regarding Question 8: *Does the Regional Coordinator have the necessary authority to implement the agreements and insure the HMB abides by them?*

I'm not sure HMB ever sought to avoid its commitments. It often moved too slowly—but not in matters Regional Coordinators were concerned with

The Regional Coordinator has the necessary authority to implement the agreements, but does not have the necessary authority to insure the HMB abides by those agreements

[yes] This is a qualified "yes." The Coordinator should not be restrained by having funds restricted to the point that many times negotiations have to take place

Depends on issues involved

We can appeal to the Regional Coordinator—he usually gets things done for us; if his office administered the agreements everything would be smoother

Too much authority; no flexibility

When I served as a Regional Coordinator from 1971 to 1987, I felt that I had all the authority that I needed to do the job. Not familiar with past 10 years.

Too much authority.

[yes] The agreements are most usually

[yes] At this moment it appears our Coordinator is authorized to negotiate and implement agreements

[yes] The authority on particular issues is well-defined. Then too, it is probably best for the decisions (important) to not be made at a meeting with us—later in a less emotional and less pressurized environment

[yes] There has been authority granted to a limit. Some adjustments were made budget-wise on small project amounts, but the granting of funds for specific church planting opportunities was not practiced in my experience

[yes] For the most part; his word has always been good, but some unilateral decisions seem beyond his control

[yes] He is all powerful thus he gets involved in programming

He has authority but it is allowed to be ignored by ministry/program staff; the President must validate the role; Larry Lewis never explained to staff that these agreements put our integrity and intentions "on the line"

[yes] And he needs to keep it

[yes] We have had no problem in this area; what was agreed with the Regional Coordinator has been implemented

[yes] Has been true with us

[yes] Probably, really depends on the ability of the Coordinator

[unsure] There is sometimes lack of clarity as to who has what authority

[yes] On paper—sometimes in the past a program leader has changed an agreed on strategy or not followed through

[yes] According to the present job description. However, this authority must come from and is dependent on administration supporting the Coordinator's decisions. Obviously it also depends on the Coordinator staying within policy and Cooperative Agreements.

[yes] If they abide by strategy plans

Regarding Question 9: *How effective are the negotiation meetings between the HMB and state conventions in targeting the greatest strategic needs in a state?*

[very effective] in the 20 New Work states

[somewhat] Controlled by state

[very effective] Because the Program Leaders make it very effective; not because the Coordinator makes it happen

They don't know us well enough to give detailed advice

This is effective if the HMB and state joined each other in a long-range planning process together. Initially, some state conventions were reluctant to share planing with the HMB/BSSB. Meetings with those states was "somewhat effective."

Effective in resourcing pet projects, but not strategic

They work well for us

[somewhat ineffective] The persons responsible for the ministries were only incidentally involved in setting the strategy

[very effective] It's really left to state to initiate!

[somewhat effective] If by this you mean Regional Coordinator alone. Better when staffers and state gather for planning in another setting

[somewhat effective] They are discussed and shared regularly. Sometimes, there is no opportunity for input by the state

[somewhat effective] The needs have been identified earlier in the priority system

[somewhat ineffective] The state may have a good idea of what their needs are, but the Coordinator working without the HMB program leaders input may not be able to bring in the national perspectives needed for strategic planning

[somewhat ineffective] Budget follows "favored" HMB programs not state strategy—state budgets shouldn't look alike every year

[very effective] when the HMB listens to the Coordinator/ if we work through Coordinator, it should be a 2-way avenue

[very ineffective] If by this you mean Regional Coordinator alone. Better when staffers and state gather for planning in another setting

[very effective] At this point—on target. The state desires and expects to target all evangelism/missions needs. We have the staff and ability to determine strategic issues and possible ways to address them

[very effective] The growth in population in our state has given opportunity to communicate need and response. The HMB has not had sources to grant funds to meet the needs; the process was good. the resources were not

[very effective] We have had some excellent meetings where we have agreed on great strategic needs, planned to meet them and seen excellent results

[somewhat effective] This depends on whether or not there are HMB or state convention funds available to address those needs

[somewhat effective] and could be improved in some states by having state program people present for part of the discussion, then final decisions with the executive alone

[very effective] Dr. Chaney has contributed greatly in this regard. His involvement has made the system effective

[very effective] The state should be able to take the lead

[somewhat effective] We know what needs are in our state, but they may not fall in national priority needs

[very effective] within current system; system needs to empower Regional Coordinators to be able to bring program/ministry personnel into accountability when there are discrepancies between request from program/ministry personnel and state request

Regarding Question 10: *Is there a better way than the current Cooperative Agreements for the new North American (NAMB) to partner with state conventions in order to do evangelism and church extension?*

I've tried to look at other ways; the Cooperative Agreement is a great instrument; the biggest problem rests with HMB presidential leadership; if he will use this process he can accomplish anything NAMB wants through these state/NAMB agreements while maintaining great relationships with state and local leaders

However, the process needs to put more emphasis on vision, strategy, and tactics and not just bureaucracy and budgets

I know of no better way, such is not to say a better way does not exist

The concept of the Cooperative Agreement is sound, however:

1. Rethink the basis on which formulas are developed
2. Consider how to prioritize money going to various states
3. consider the relative ease of electronic communications between NAMB president and the respective state execs. All the travel by Regional Coordinators is both unnecessary and is a major factor in slowing the process

[no response] I do not know the answer to this question. I would be reluctant to make a change without critical testing of any new procedure. Advances that have been made in computer programming, communication by e-mail, etc., may call for a review. I sat through many meetings with HMB leaders before the Cooperative Agreement, and found that I could work one program leader against the other at the HMB. When one person (Coordinator) represents all the programs, there is no way to create that situation. The Coordinator must know how far he can go, where the priorities are, and stick to his guns.

Keep the partnership in tact, otherwise the system will shatter and we will be delayed and have to "build the machine again."

[non response] Overall the Cooperative Agreement works well for us

Not at this point

[nonresponse] There has to be cooperative understanding or the role of NAMB will diminish to involve only weaker states and special projects. Special projects in stronger states will be difficult to carry out without full participation.

No, the current Cooperative Agreement has proven to be the most effective means of the HMB relating to states in developing an HMB-state strategy

[no] The best way to do missions has not been discovered yet. I believe there is always a better way. I like the partnership we have with the HMB. I hope the relationship remains cooperative and locked into a partnership. I am also prepared to upgrade our agreements to more effectively resource the missionary personnel who are involved in bringing in the harvest.

[no] We need agreements

[no]—but the whole process needs correcting

[no] States need the freedom to develop their strategy and the HMB has allowed this

[no] We need Cooperative Agreements (1) They need to be strategy-focused (2) Funding needs to follow strategy (3) State conventions need a full-partner voice in establishing strategies

[no] Cooperative Agreements are mission strategic, if NAMB wants to be a national agency, working with all states, lifting up vision of national strategy, enlisting broad-base financial support

[no] Good concept: would be better to allow state autonomy. Again, the partnership is good—methodology needs evaluation

[no] The Cooperative Agreement is the very best way I know of

[no] The Cooperative Agreement provides partnership with each retaining autonomy

[no] They have been very successful; must maintain level of trust and respect to work

[no] Unless newer state directors might move aggressively and interact as a group as well as individually in an appropriate forum.

[no] We're very pleased with present arrangements

Regarding Question 11: *Is there a better name for the relationship between NAMB and state conventions other than "Cooperative Agreements"?*

Covenant; Abstract of Partnership

Who has time to care what the process is called???

I am not wed to this terminology. The concept in both these words (cooperative and agreement) has been fundamental to our SBC life and procedures. When the HMB and Texas Baptist Convention realized they had appointed Spanish missionaries to the same community independently, the Cooperative Agreement was born.

Doesn't matter what you call it. What is done with it does matter.

The term is adequate, but if you are going to have a new term, anything will do if properly and clearly defined

Might be the present name is OK

What better describes the SBC system: Dis-operative!

Must lift up partnership and cooperation in mission

It communicates!

The name is not the issue

[nonresponse] Agreement was used because these are not legal documents—cooperation is best of agreements

[no] This is adequate

[no] "Cooperative Agreements" describes perfectly what it is

[no] The current name is well known and the objective is known, so there is no real reason to change it

[no] The arrangement **MUST** remain cooperative and mutual