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IACCA PERSPECTIVES

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Sustaining the Vision in the Face of Institutional Resistance

By Jack Shitama, Director, Camp Pecometh

Imagine you had spent two years developing and executing a strategic plan to dispose of an underperforming retreat center and replace it with a new center on an already owned property. Then, just as you are preparing to settle on the sale of the old property and get judicatory approval for the new project, you are told by judicatory officials that they oppose the new development. This was the situation we faced in early 2005 in the Peninsula Delaware Conference of The United Methodist Church (the Conference).

THE STRATEGIC PLAN

Drayton Retreat Center had been given to the Conference in 1965 by an anonymous donor to be used by the church for adult retreats. This elegant Georgian mansion on a stunning waterfront property had 43 beds in 17 bedrooms. It quickly became a favorite for many retreat guests. Yet, throughout its 40 years, it struggled financially to cover its operating costs. This became increasingly more difficult as adult tastes moved toward single/double occupancy rooms and more modern meeting spaces.

In 2002 we retained Kaleidoscope, Inc. to help us develop a strategic plan to turn Drayton around. They determined that Drayton was turning away business because it lacked bedroom and meeting space. They proposed an expansion that would enable Drayton to host as many as four groups of 12-20 persons simultaneously, a level of business that the current demand would support. The Board enthusiastically adopted the strategy to expand Drayton. However, in late 2002, initial meetings with county planning staff made it clear that we would have a difficult time

Key Point #1

The main thing is to keep the main thing the main thing — be clear about your center's vision

Key Point #2

There's no substitute for preparation — do your homework

Key Point #3

Nobody benefits from a win-lose solution — be a team player

Key Point #4

Lone rangers don't last long — utilize your support systems

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obtaining the zoning necessary to expand Drayton. As the reality set in, a new plan began to emerge.

Drayton's sister property, Camp Pecometh, is located 20 miles to the south on the Chester River in Centreville, Maryland. It has been operated since 1946 as a summer camp and youth retreat facility. Its 275 acres and 4000' of shoreline provided plenty of space to add the one thing it lacked, adult retreat facilities. It became clear that rather than trying to expand Drayton, it was much better stewardship to sell Drayton and put the proceeds toward developing a new adult retreat center on the Camp Pecometh property.

In February 2003, the Board adopted a strategic plan that proposed exactly that – the sale of Drayton and the development of an adult center at Pecometh. And, despite the shock and grief that came from the many persons with emotional ties to Drayton, the Conference approved the proposal at its annual meeting in June 2003.

EXECUTING THE PLAN

We immediately began the process of selling Drayton. In addition, we asked Kaleidoscope to work with us to transfer the essentials of the Drayton plan to the Pecometh property. Our thinking was that the retreat operations would still have the same customer base, facilities needs and operating principles, but would be transferred over to the Pecometh property.

We also retained the Goehner Group to do a capital campaign feasibility study to determine whether or not the proposed project was realistic. By the end of 2003 we had a contract for the sale of Drayton, a clear idea of how much money we could raise and a deep conviction that we were headed in the right direction.

Because the sale of Drayton was a complex commercial transaction in which the buyer/developer needed a significant feasibility study period, it was apparent that it would take a year to go to settlement. In the meantime, we engaged in a thorough selection process for an architect and began the conceptual design phase of the project.

By early 2005 we were nearing the completion of the conceptual design phase and were anticipating settlement on the sale of Drayton. We were preparing to bring the project to the Annual Conference for approval, as well as authorization to conduct the necessary capital campaign. We expected to net \$3.3 million on the sale of Drayton and would need to raise about \$2 million to complete Phase I of the adult retreat center project.



ENCOUNTERING RESISTANCE

It was precisely at this time, just four months from when we were to ask for Conference approval, that we were informed that the Cabinet of the Conference was opposed to the project. Our Cabinet is comprised of our Bishop, four District Superintendents (DS) and, for program purposes, the Director of Connectional Ministries (DCM) and the Conference Treasurer.

In two separate meetings, one with me, the Director of Camping & Retreat Ministries, and one with key Board members and me, the DS's made it clear that they were opposed to the development of an adult retreat center. Instead, they felt that it was more prudent to invest the \$3.3 million proceeds from the sale of Drayton into an endowment that would subsidize retreats at commercial facilities such as hotels and for-profit conference centers.

Clearly, we disagreed fundamentally on the best way to deliver adult retreat ministry. Yet, the questioned remained, what should we do as a Board to respond to the objections of the Cabinet? I will share four principles that I think our experience in this situation highlights.

BE CLEAR ABOUT THE VISION

It is natural to second guess one's self when encountering resistance. In fact, a certain amount of skepticism and critical examination is healthy. Yet, at some point, leadership requires boldness and courage if an organization is going to move forward. At the same time it is important that the firmness of one's convictions be tempered with humility.

Our response to the Cabinet was that we respected their opinion and heard their concerns. However, we emphasized that we felt it was our responsibility to work for the best interests of Camping & Retreat Ministries in our Conference. We reiterated that the Vision toward which we were working was the result of thorough consideration and was supported by a well-defined strategy. Finally, we appealed to the polity of our Conference, reminding the Cabinet that, ultimately, the decision belonged to the people of the Conference.

DO YOUR HOMEWORK

While the sale of Drayton may have been a difficult decision, the prospect of reinvesting the proceeds of the sale in a \$5 million capital project seemed a significant risk, when viewed from the Cabinet's perspective. Our Conference, like many mainline church judicatories, is under considerable pressure. Declining church membership, increased health care costs for an aging clergy population and considerable assets tied up in older

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church facilities have created difficult financial conditions. It was no wonder that the Cabinet questioned whether this was the best use of our resources.

Fortunately we had done our homework. Because of this, we were able to answer their questions and concerns, not just with generalities, but also with specifics. From the time we first developed a strategic plan for adult retreat ministry to the time we first heard from the Cabinet about their concerns we had:

- taken three separate surveys from constituents in the Conference regarding adult retreat ministry needs and desires.
- developed the Capital Campaign feasibility study, which included both mail-in and face-to-face interview surveys.
- conducted two separate analyses of using an Endowment to subsidize adult retreats at other facilities, including contacting other judicatories to ascertain whether others had been successful with this approach.
- held preliminary meetings with the county planning zoning staff where Pecometh was located to determine whether they would support our plans to develop an adult retreat center.
- developed 10-year pro-forma financial statements for the projected adult retreat operation, using three different operating scenarios, from worst-case to best case.

Thus, while the Cabinet may not have agreed with our position, they could NOT fault us for lack of preparation. Of course, their questioning made us review our work to determine if we could still arrive at the same conclusions. But at least we had that work to which we could refer.

BE A TEAM PLAYER

When you believe you have a vision for where your center should be headed and a passion to get there, it is not hard to feel defensive when people question that, especially when those people have considerable influence in your institution. Yet, getting defensive, playing politics and seeking to win to prove a point can be more destructive than helpful. Those behaviors distract people from focusing on the issues at hand to do what's in the best interests of the center and the institution.

In our case, we really felt pressure because we were preparing to bring a resolution to our Annual Conference session in June 2005 to obtain approval for the new retreat

center project. By the time we had finished our second meeting with the Cabinet we were only 2-1/2 months away. The Cabinet proposed that we defer our resolution until October 2005, which was when a Special Session of Annual Conference was scheduled to deal with pressing budget matters.

We were concerned about waiting because we felt that this would allow more time for members of the Cabinet to influence the clergy of our conference. In addition, we believed that juxtaposing our proposed \$5+ million project with the financial difficulties of the Conference could possibly play on the fears of the delegates, making it more difficult to make our case.

However, as we reflected on the situation, we realized that if we could not make the case for the new retreat center in October, then there was obviously not enough support for our vision. We concluded that there was no value in trying to force the issue, but instead should continue to be in dialogue with the Cabinet to hear their concerns, as well as inform them further about our proposal.

We made an "information only" presentation at the June session of Annual Conference to let the delegates know what they could expect to be forthcoming in October. We then set about working with various conference committees: the Board of Trustees, Council on Finance & Administration and Conference Vision Team, to gain the approvals and endorsements needed for adoption of our proposal in October.

UTILIZE YOUR SUPPORT SYSTEMS

Throughout this time, I relied heavily on my personal and professional support systems. Of course, family and friends are always a helpful source of encouragement. I also participate in a men's covenant group where I could share frustrations and get honest feedback. I was also in regular contact with several IACCA members from other centers. While they might not have had identical experiences, they could certainly relate to many of the things I was encountering.

More importantly, I found the wisdom and experience of my IACCA colleagues to be invaluable as I worked through our situation. These colleagues were able to listen without judgment, provide suggestions and an occasional reality check. They also put me in touch with others who could shed insight on our situation. In hindsight, it is clear that this situation required persistence and patience. It was because of these support systems that I had such persistence and patience.

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THE OUTCOME

The Special Session of Annual Conference met on October 8, 2005. We had received a pleasant surprise in the weeks leading up to the Conference when the Council on Finance & Administration said that they not only endorsed our proposal, but also wanted to be the body that actually made the resolution. By having another Conference committee bring the resolution, it strengthened our case even further. The Conference session voted overwhelmingly to approve the proposal for the new retreat center.

While it might be easy to look back and feel as if the decision were never in doubt, I know that it didn't feel that way for a prolonged period of time. What we have learned is that our duty is to work in the best interests of the centers that we serve. This sometimes brings us into conflict with others in our institutions, but if we keep those best interests in focus, we can be our most effective in working toward win-win solutions.

About the Author

Jack Shitama is serving in his seventh year as the Director of Camp Pecometh, which is owned by the Peninsula Delaware Conference of The United Methodist Church. Prior to that he pastored for nine years.

He and his wife, Jodi, have been married for 24 years. They have four children: Megan, 23; Erin, 19; Kieron, 18; and Kellan, 14. He is serving his second term as IACCA President.

IACCA EDUCATION COMMITTEE'S PERSPECTIVE ON THE PERSPECTIVE

What are the core principals of our profession? Are there some basic understandings that guide the thoughts and actions of an IACCA professional? Yes!

Earlier this year, the IACCA Board of Directors adopted a set of core principles that have been incorporated into the curriculum for certification as an IACCA Conference Center Professional. The principles were refined by the Capstone Class of '06 and approved by the education committee.

The recent "Perspective" by President Jack Shitama reflects several of these principals.

When differences of opinion emerge, it is important to remember how ownership and control is structured and to work within the system. If there is a board of directors that reports to a larger body and that body is, in fact, the owner, then it is important that the director keep all the interested stakeholders on board. It's a Core Principle:

- The Board of Directors owns or represents the owners of the center.
- Center administration requires a clear understanding of the roles of the Board and the Director and the linkage between the two.

The director has an important leadership responsibility to follow the center's master (and strategic) plan and keep the constituency informed. It's a Core Principle:

- Master planning is the key to long-term success.

International Association of
Conference Center Administrators
1270 N. Wickham Road
Suite #16-111
Melbourne, FL 32935

www.iacca.org



About IACCA

The International Association of Conference Center Administrators (IACCA) is an association of nonprofit conference center professionals committed to education, professionalism, and support.

1. IACCA offers educational opportunities for its members and for those with whom they work.
2. IACCA promotes professional excellence in nonprofit conference center leadership, administration, and operation.
3. IACCA provides a supportive community that facilitates the sharing of knowledge and experience and the addressing of common challenges.