

Call to Action

Steering Team Report

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Nashville

Call to Action
Steering Team Report

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Letter from the Steering Team

To: The Council of Bishops
The Connectional Table

Dear Colleagues:

Making disciples of Jesus Christ for the transformation of the world is our mission. Our aspiration is to order the life of the Church so that leadership, structures, funding, and practices are aligned for faithful witness and fruitful ministry.

The Call to Action Steering Team was privileged to accept the challenge and opportunity to conduct an assessment and offer recommendations *leading to* reordering the life of the Church for greater effectiveness and vitality in mission.

As a result of prayer, discernment, and work together, we envision a global connectional Church that has a clear consensus about its mission to make disciples of Jesus Christ for the transformation of the world, with local congregations being the most significant arenas where this mission occurs. This vision demands that we order our connectional life and practices in ways that depart from current prevailing practices.

We must reduce the perceived distance between the general Church (including the general agencies), the annual conferences, and local congregations. We must refashion and strengthen our approaches in leadership development, deployment, and supervision. We must articulate dramatically higher performance expectations and commit to achieving them—with a much greater emphasis on outputs as contrasted with intentions and activities—in the work of all leaders of the Church. We must invest more resources for the ministries of local churches, including those in the Central Conferences, and reconceive and reform connectional funding practices (including frameworks for apportionments for local churches). We must refresh expectations and reform procedures of the Council of Bishops. In short, we must change our mind-set so that our primary focus and commitment are on fostering and sustaining congregational vitality.

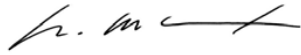
The process and principles used to guide our work are described in the enclosed report. After prayerful deliberation, study, and holy conferencing, we offer the following for your consideration, improvement, and urgent response.

Sincerely,

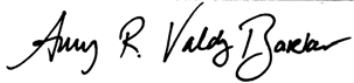
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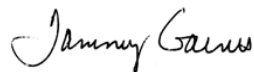
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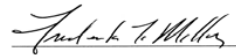
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Executive Summary

The Call to Action Project was launched by assignment from the Council of Bishops with endorsement and funding from the Connectional Table in November 2009, building on work of the previous Call to Action Committee.

In January 2010 the Call to Action Steering Team was formed to gather data, including a mandate to seek an objective operational assessment of the Connection that will result in findings and recommendations *leading to* the reordering of the life of the Church for greater effectiveness in making disciples of Jesus Christ for the transformation of the world.

Jesus came near and spoke to them, "...go and make disciples of all nations...teaching them to obey everything that I've commanded you. Look, I myself will be with you every day until the end of this present age." (Matthew 28:18-20 CEB)

The Steering Team began with:

- The reassurance that the people called Methodists "are God's accomplishment, created in Christ Jesus to do good things. God planned for these good things to be the way that we live our lives" (Ephesians 2:10).
- A confession that as a Church we have pursued self-interests and allowed institutional inertia to bind us in ways that constrain our witness and dilute our mission. We have been preoccupied more with defending treasured assumptions and theories, protecting our respective turf and prerogatives, and maintaining the status quo for beloved institutions.
- An unflinching recognition of decades of decline in membership and attendance, less engagement and influence in communities than desired, aging constituencies and leaders, and financial strains.
- An emphasis that any "reordering" should be predicated upon sound and accurate understandings of how to best direct leadership, time, talent, and money to cultivate more vital congregations.

- A commitment to work from a foundation of facts rather than opinions by commissioning research based on extensive data-mining and objective methods for identifying relevant trends, behaviors, and issues.

Vital Congregations Research—(Towers Watson)

Reliable statistical findings based on massive amounts of data from over 32,000 congregations show that high-vitality churches consistently share common factors *that work together* to influence congregational vitality and are characterized by the prevalence of:

- Effective pastoral leadership including inspirational preaching, mentoring laity, and effective management
- Multiple small groups and programs for children and youth
- A mix of traditional and contemporary worship services
- A high percentage of spiritually engaged laity who assume leadership roles

(Details of Towers Watson research appear in appendixes 1 through 6.)

Independent Operational Assessment—(Apex)

Objective examination of data, trends, and observations from UMC leaders led to identification of a creeping crisis of relevancy with an accompanying acute crisis of an underperforming economic model that are both linked to frailties in the UMC's culture. These include the absence of common definitions for the *meaning* of our mission statement, lack of trust, low levels of mutual respect, the frequent absence of civil dialogue, insufficient clarity about the precise roles and responsibilities of leaders, and a lack of agreed ways to measure success or assure collaboration.

Thus we identify the need for:

- Recognition of the value and need for the Council of Bishops to exercise strong and courageous leadership, working in concert and fostering alignment throughout the Connection
- More clarity and understanding about the UMC's mission, culture, and values
- Less perceived organizational “distance” between and among the foundational units of the church
- Better-defined leadership roles, responsibilities, and accountability; with greater clarity about outcomes
- More standardized management processes and reporting systems
- Streamlining of connectional structures to achieve effective governance, lowered costs, and higher levels of performance.

(Details of Apex research appear in appendixes 7, 8, and 9.)

Findings

While there are many examples of effective disciple-making, prophetic witness, and ministries of justice and mercy across the Connection, these efforts do not obviate the effects in the United States and Europe of our increasingly older membership and aging leaders; declines in the numbers of professions of faith, worship attendance, and baptisms; and growing financial burdens accompanied by decreasing revenues.

Thus, the adaptive challenge for The United Methodist Church is:

*To redirect the flow of attention, energy, and resources to an intense concentration on fostering and sustaining an increase in the number of **vital congregations** effective in making disciples of Jesus Christ for the transformation of the world.*

To do so requires that we:

- Change our mindset so that our primary focus and commitment is on fostering and sustaining **congregational vitality** (see *The Book of Discipline 2008*, pars. 201, 202)
- Articulate and commit to newly clarified and dramatically higher performance expectations for all levels of the church
- Expect and provide courageous, accountable leadership that assumes responsibility for upsetting current paradigms and shaping and adopting new understandings that result in more effective practices—and that this begin with the Council of Bishops
- Institute and report measurable performance results in all sectors of the Connection on an ongoing and regular basis, enabling us to learn and adjust the ways we invest and use our talent, time, and money.

Leaders, beginning with the bishops and including lay and clergy across the Connection, must *lead* and immediately, repeatedly, and energetically make it plain that our current culture and practices are resulting in overall decline that is toxic and constricts our missional effectiveness. We propose a set of mutually interdependent initiatives.

Key Recommendations

1. For a minimum of ten years, starting in January 2011, use the drivers of Vital Congregations (see appendix 5, Potential Drivers of Congregational Vitality) as initial areas of attention for sustained and intense concentration on building effective practices in local churches.
2. Dramatically reform the clergy leadership development, deployment, evaluation, and accountability systems.

Key Drivers of Vitality**

- Effective pastoral leadership including aspects of management, visioning and inspiration
- Multiple small groups and programs for children and youth
- Mix of traditional and contemporary worship services
- High percentage of spiritually engaged laity who assume leadership roles

**See appendix 1.

3. Collect, report and review, and act on statistical information that measures progress in key performance areas to learn and adjust our approaches to leadership, policies, and the use of human and financial resources (this will include indicators such as how congregations and annual conferences are increasing their effectiveness in implementing the three factors of vitality from the Towers Watson report: attendance, growth, and engagement).
4. Reform the Council of Bishops, with the active bishops assuming (1) responsibility and public accountability for improving results in attendance, professions of faith, baptisms, participation in servant/mission ministries, benevolent giving, and lowering the average age of participants in local church life; and (2) establishing a new culture of accountability throughout the church.
5. Consolidate program and administrative agencies, align their work and resources with the priorities of the Church and the decade-long commitment to build vital congregations, and reconstitute them with much smaller competency-based boards of directors in order to overcome current lack of alignment, diffused and redundant activity, and higher than necessary expense due to independent structures.

(For a detailed description of the key recommendations, see chapter 5.)

3

Introduction and Overview

The Assignment

In the fall of 2009 the Call to Action Steering Team (CTA) was commissioned by the Council of Bishops with support from the Connectional Table. The charge was to conduct an assessment *leading to* reordering the life of the church for greater effectiveness and vitality in

- The mission of **making disciples of Jesus Christ** for the transformation of the world, and
- Addressing the ***Four Areas of Focus*** (global health, ministry with the poor, creating new places of worship/discipleship for new people, and revitalizing congregations and developing principled leaders) affirmed by the 2008 General Conference as distinctive ways we live into that mission together.

The Council of Bishops (COB) authorized, and the Connectional Table (CT) funded, the team in order to implement the next phase of the Call to Action journey that began a year earlier. The first phase of the ***Call to Action*** effort grew out of deliberations by COB and CT leaders working in tandem with the presidents and general secretaries of the general agencies of the UMC. The new CTA was charged with receiving and reviewing the data gathered by the first group and with preparing findings and recommendations based on its research and assessments. The information and suggestions forwarded by the original committee served as launching pads, but not constrictive barriers, for the work of the newly constituted ***Call to Action Steering Team***.

While the world-wide economic crisis was an important impetus in igniting the CTA effort, the sense of urgency that propelled the work was prompted by a much wider array of factors. These included the four-decade decline in membership; an aging and predominantly Anglo constituency; declines in worship attendance, professions of faith and baptisms; and other unfavorable trends related to clergy health and job satisfaction,

decreases in giving, and concerns about the vitality of our engagement with and service to communities in the United States and Europe.

In its report to the Council of Bishops, the original CTA group noted that it is the gap between our current situation and our aspirations that lead United Methodists to dream of a church with

- more grace and freedom and fewer rules
- more accountability to the Gospel and less conformity to an outdated, bureaucratic system
- more participation with young people and less rhetoric about our good intentions to include and engage younger people
- more ministry with the poor and less reticence to link arms with the desperate, the sick, and the hungry
- more expectation for growth in worship and involvement in missions and less acceptance of status quo of membership decline
- more interaction with the margins of society and less retreating to the reassurance of traditionalism
- more work on the Four Areas of Focus and less on many worthy but ultimately sub-optimal tasks
- more positive expression of our United Methodist Connection in ecumenical, interfaith families and less autonomy and parochial self-interest
- more dreaming about what will be and less struggling to preserve what was
- more giving to direct ministry and less to administration and governance
- more trust and less cynicism

With this background and mandate, the Call to Action Steering Team was named, along with a Project Team, to serve as a small work group that could assist in managing the project through several steps of discernment, research, examination of findings, and fashioning of recommendations.

The original CTA group said in their report that reordering the life of the church requires affirmation of the following principles:

- Starting with no preconceived ideas of what will continue, be changed, or be ended
- Becoming nimble, lean, *and* more effective
- Aligning all facets of the church with the mission, lived out through the Four Areas of Focus
- Becoming more financially sustainable in order to assure viability in the future
- Reviewing all Disciplinary mandates to glean only what is *most* essential to achieve the mission

The report emphasized that organizational change is essential but that before redesigning existing structures, we must assess the operation, structures, and relationships of the entire system, including general agencies, the Council of Bishops, and the Annual Conferences. The group urged the use of an outside, independent consultant to objectively guide that process.

The Procedure

The Call to Action Steering Team conducted its work and met at intervals from January through October 2010.

Steering Team Co-Chairs: Bishop Gregory V. Palmer and Neil M. Alexander.

STEERING TEAM MEMBERSHIP:

Jorge Acevedo Lead Pastor Grace United Methodist Church Cape Coral, FL	John Hopkins Resident Bishop, Ohio East Area and Chairperson, Connectional Table North Canton, OH
Neil Alexander President and Publisher United Methodist Publishing House Nashville, TN	John Innis Resident Bishop, Liberia Area Monrovia Liberia West Africa
Amy Valdez Barker Associate Minister of Families with Youth First United Methodist Church Athens, GA	Scott Johnson President, Association of Annual Conference Lay Leaders Buffalo, NY
Judy Benson Member of Connectional Table Frederick, OK	Kent Millard Lead Pastor St. Luke's United Methodist Church Indianapolis, IN
Ben Boruff Member of Connectional Table Indianapolis, IN	Fred Miller President The Chatham Group, Inc. Chatham, MA
Judy Chung Pastor Placentia United Methodist Church Placentia, CA	Gregory Palmer Resident Bishop, Illinois Area and Past President, Council of Bishops Springfield, IL
Larry Goodpaster Resident Bishop, Charlotte Area and President, Council of Bishops Charlotte, NC	Abel Vega Director of Connectional Ministries and Congregational Development Rio Grande Conference San Antonio, TX

Erin Hawkins General Secretary General Commission on Religion and Race Washington, DC	Rosemarie Wenner Resident Bishop, Germany Area and President Designate, Council of Bishops Frankfurt Germany
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A Project Team was also named to provide consultative and administrative support:

PROJECT TEAM MEMBERSHIP:

Neil Alexander President and Publisher United Methodist Publishing House Nashville, TN	Tammy Gaines Vice President Business Operations United Methodist Publishing House Nashville, TN
Darryl Barrow District Superintendent, Crossroads District, North Central New York Conference Cicero, NY	Doug Lewis Past President of Wesley Theological Seminary Washington, DC
Bob Burkhart Assistant to the Bishop Iowa Conference Des Moines, Iowa	Fred Miller President, The Chatham Group, Inc. Chatham, MA

Seasoned organizational consultant Fred Miller, with extensive experience as an active United Methodist, advisor to annual conferences, bishops, and general agencies, responded gracefully to the invitation to donate his services to guide the process of the Steering Team’s work. The team contracted with two highly regarded and experienced outside consulting firms. The international firm Towers Watson conducted the extensive data-mining Congregational Vitality research (see appendixes 1 through 6) and Apex performed the UMC Organizational Assessment (see appendixes 7, 8, and 9).

Early in the process there was strong agreement by the Steering Team that not only should eventual recommendations be rooted in the findings of the independent, outside organizational audit/assessment called for in the team’s charge from the COB, but that all considerations for reordering the life of the church should be predicated upon sound and accurate understandings about how to direct resources in order to foster vitality in congregations.

This foundational premise led to developing a unique, intensive, and highly informative research project that employed a methodology using rigorous and comprehensive interviews, questionnaires, data mining, and regression analysis of thousands of elements of available data to identify statistically significant “drivers” of local church vitality (for details about what represents vitality and the methods used in the research, see appendix 4).

Due to the enormity of the task and related limitations in the availability of consistent data and the amount of funding and time available to the Steering Team, we agreed that as a first-phase effort, the vital congregations research would focus only on the UMC

congregations in the United States. Practical constraints were the only basis for limiting the scope of the effort at this time, and we hope and encourage that there will be continuing study of congregational effectiveness in the years to come that includes all regions of The United Methodist Church.

The second research project used proven methods for analyzing financial and other trends along with in-depth interviews and questionnaires to describe the current state of the mission, culture, values, structure, and processes of the Church.

The findings from both research efforts can be found in the appendixes (for full reports, see appendixes 1 and 8).

The Steering Team was unflinching in acknowledging decades of decline in membership, attendance and influence; lack of mission clarity and low confidence among many UMC leaders about aspects of Church life; an increasing tendency to turn inward and emphasize institutional survival, increasing financial pressures; and a widespread failure to engage and involve significant numbers of younger and more diverse people.

These facts along with the findings from the research projects led the Steering Team to the firm conclusion that the critical adaptive challenge for The United Methodist Church is:

*To redirect the flow of attention, energy, and resources to an intense concentration on fostering and sustaining an increase in the number of **vital congregations** effective in making disciples of Jesus Christ for the transformation of the world.*

Observations

Grounded in the Christian faith and our Wesleyan tradition, and drawing from relevant research, recommendations and reflections, we take note and conclude that:

- In living out our mission as The United Methodist Church to make disciples of Jesus Christ for the transformation of the world, we must invest more in initiatives that foster congregational vitality and spend less time bemoaning organizational dysfunction or stressing “renewal” as if to restore past achievements.
- Though there are conflicting opinions about what matters most in defining vitality and how to cultivate it, this must not be allowed to prevent us from engaging in church-wide, sustained work that draws upon both a sense of urgency and high expectations for specific results.
- The character of our UMC culture, even more than the details of our organizational structures, has the greatest impact on our effectiveness. We regret that there is currently a pervasive sense of “distance” between key points of the UMC Connection. We are confident that through renewed and regular practice of the disciplines of confession, prayer, and holy conversation, we can rebuild high levels of trust, leading to a strong sense of being connected by the love of Christ in common mission.

- There are many serious issues that must not be ignored that present extraordinary challenges, and there are also opportunities for reform and thus for renewing and enriching connectional structures and processes.
- The connectional system requires clarity about our mission, but despite widespread repetition of the theme "making disciples of Jesus Christ for the transformation of the world," we are of many minds about its meaning, significance, and adequacy.
- A number of practices that foster congregational vitality are known to the church and we can and must choose to dedicate attention, leadership, and resources to cultivating them in every congregation.
- Deciding what to measure as indicators of effectiveness is often debated, but the research is conclusive that we can stimulate vitality if at a minimum we join together to:
 - increase the numbers of people participating in worship and small groups for prayer and study—starting and maintaining more programs for children and youth
 - encourage spiritually devoted lay persons to share leadership roles in every facet of Church life
 - offer multiple worship experiences and cultivate dynamic topical preaching
 - improve pastoral effectiveness, including aspects of management and leadership
 - provide longer clergy appointments where it is apparent that the gifts of the pastor fit the needs of the church and its community
 - consistently cultivate incremental increases in financial giving and engagement in outreach, witness, and mission in local communities and the world.
- The quality of clergy and lay leadership is essential for effectiveness, and we must retool our culture and systems of clergy recruitment, training, credentialing, and support with renewed emphasis on greater accountability for outcomes, giving appropriate, but much less, focus to intentions.
- We must streamline the connectional structures to achieve effective governance, lower costs, and attain higher levels of performance.
- We should passionately care about *results* and therefore standardize and centralize the collection and regular publication of progress updates for churches, pastors, district superintendents, annual conferences, bishops, and general agencies.
- Continuing periodic congregational research and the reporting of findings will help leaders understand and respond to trends, learn about and adopt best practices, and set an expectation for continuous learning and adaptation essential for our effectiveness.

The Call to Action Steering Team shared in worship and daily reading of Scripture, and prayerfully sought the leading of the Holy Spirit. We solicited, received, and studied the findings of researchers and invited guidance from spiritual leaders, pastors, and others to

gain insight about the experience, perspectives, and aspirations of the people called Methodists.

The information, conclusions, and recommendations that follow are rooted in the treasures of our Scriptural heritage and Wesleyan theological foundations. In our work together we began our deliberations with worship and prayer. Along the way we sought insights and guidance from gifted church leaders.

But we know that we have only begun to mine and attend to important matters of ecclesiology and missiology that must be pondered and incorporated in the Church's thinking and planning going forward. We are mindful of the work of the Committee on Faith and Order that is focusing on ecclesiology, and we welcome their report, along with the insights of scholars and other faithful leaders that will enhance our shared appreciation of God's call to the Church.

We are aware that several groups are engaged in important studies that will result in recommendations and that these will be evaluated in light of overlapping and interacting aspects of our life together. Examples include the Ministry Study Committee, the Commission on the Worldwide Nature of the Church, the Connectional Funding Task Force, and others. We welcome and look forward to robust, holy conversation about how these several strands of assessment and planning can best blend together or how they may represent contrasting views as we all move forward.

One of the lessons we affirmed is that in organizational life attention to a few leverage points rather than a laundry list of issues and initiatives can be instrumental in setting in motion changes that lead to long-term, *continuous* improvement. Therefore, we offer in the following pages a limited number of critical action initiatives that, when pursued, will be catalysts for substantial, sustained, and systemic change.

4

Confession and Call for Leadership

Confession

“You are saved by God’s grace because of your faith. This salvation is God’s gift. It’s not something you possessed. It’s not something you did that you can be proud of. Instead, we are God’s accomplishment, created in Christ Jesus to do good things. God planned for these good things to be the way that we live our lives” (Ephesians 2:8-10 CEB).

By God’s grace we live, move, and have our being. By God’s grace we have been saved. By God’s grace we are created in Christ Jesus for good works. By God’s grace we have been shaped to live as a Wesleyan movement serving in God’s mission of “making disciples for Jesus Christ” (see Matthew 28:19) for the transformation of the world.

In thankfulness for God’s preparing, accepting, and sustaining grace we are called to examine ourselves individually and collectively for how we live out our calling in faithfulness and trust in the triune God “to serve the present age” (Charles Wesley).

Having been called, justified, and sanctified by grace, we—the people called United Methodists—repent and renew our covenant with God and one another.

We Confess:

O holy and merciful God, we confess that we have not always taken upon ourselves the yoke of obedience, nor been willing to seek and do your perfect will.

We have pursued self-interests and allowed institutional inertia to bind us in ways that constrain our witness and dilute our mission. We have been preoccupied more with defending treasured assumptions and theories, protecting our turf and prerogatives, and maintaining the status quo for beloved institutions than with loving you with all our heart and mind and soul and strength. And we have not loved our neighbors as ourselves.

You have called to us in the need of our sisters and brothers, and we have passed unheeding on our way.

May almighty God, who caused light to shine out of darkness, shine in our hearts, cleansing us from all our sins, and restoring us to the light of the knowledge of God's glory, in the face of Jesus Christ our Savior. Amen.

Call for Leadership

“We assert that God’s grace is manifest in all creation even though suffering, violence, and evil are everywhere present. The goodness of creation is fulfilled in human beings, who are called to covenant partnership with God. God has endowed us with dignity and freedom and has summoned us to responsibility for our lives and the life of the world” (Par. 101, *The Book of Discipline 2008*).

The current trajectories of trends have unmistakable consequences. While there are many examples of effective disciple-making, prophetic witness, and ministries of justice and mercy across the Connection, these efforts do not obviate the effects in the United States and Europe of our increasingly older membership and aging leaders; declines in the numbers of professions of faith, worship attendance, and baptisms; and growing financial burdens accompanied by decreasing revenues. Amid the numerous critically important theological and spiritual considerations there are unassailable organizational and operational realities that both illustrate and affect them.

We need passionate and focused leaders who will name the truth of the current situation and lead us toward bold and achievable goals consistent with our calling. We yearn for leaders who take responsibility and deliver observable, bountiful, and sustainable ministry outcomes. Courageous, collaborative leaders are much more important than layers of intricate legislation or revamped organizational structures.

John Wesley was not afraid to identify the loss of spiritual vitality and true effectiveness in the Church. He knew that only plain speaking about and commitment to address the hard problems of his day would change the situation: “Where is [Christian fellowship] to be found? Look east or west, north or south; name what parish you please. . . . What Christian connexion is there between them? . . . What watching over each others’ souls? What bearing of one another’s burdens?” (*Plain Account of the People Called Methodists* in *The Works of John Wesley*, Bicentennial Edition, 9:259).

Leaders, beginning with the bishops and including lay and clergy across the Connection, must lead and immediately, repeatedly, and energetically make it plain that our current culture and practices are resulting in overall decline that is toxic and constricts our missional effectiveness.

Continued pursuit of the most prevalent of current approaches, structures, policies, and practices is likely to produce the same results with continued decline and decreasing mission impact.

Business as usual is unsustainable. Instead, dramatically different new behaviors, not incremental changes, are required.

The absence of strong, adaptive, decisive leadership will hasten the rate and magnitude of the well documented indicators of decline (baptisms, professions of faith, membership, attendance, funding for connectional ministries).

We need a cadre of mutually committed, collaborative, turnaround leaders that (1) make a compelling case for daring, disciplined, and sustained actions and (2) demonstrate strong leadership to vividly change what we emphasize, and de-emphasize many current treasured approaches and programs and forego familiar rhetoric that, though valued, does not lead to effectiveness in achieving different and desired outcomes.

Making this change requires leaders to forge strong coalitions, joining with willing partners who agree to disagree about lesser matters and setting aside many passionate causes in order to focus instead on overarching goals for the greater good. Choosing to continue behaviors that arise from narrow interests and subordinate objectives will lead to increased divisiveness and accelerate the current disintegration.

This calls for nothing less on the part of all who will lead than the kind of denial of self that Wesley placed at the heart of the sanctified life. “The ‘*denying*’ ourselves and the ‘*taking up our cross*’ . . . is absolutely, indispensably necessary, either to our becoming or continuing his disciples.” (Sermon 48, “Self-Denial,” emphasis added). But even more so, it requires us to follow Paul’s advice that by “having the same love, being united, and agreeing with each other,” we might “adopt the attitude that was in Christ Jesus” (Philippians 2:2, 5 CEB).

This is not a time for leaders who are ambivalent, reluctant, or unwilling to walk forward with humility and courage.

Key Recommendations

We believe that (1) stronger, courageous, collaborative leaders and (2) emphatically directing the flow of attention and resources to assure congregational vitality are essential, adaptive challenges for The United Methodist Church to be effective in its mission and to change the path of decline. Therefore, we propose a set of mutually interdependent initiatives:

1. **For a minimum of 10 years, starting January 2011, use the drivers of Vital Congregations (see appendix 5, Potential Drivers of Congregational Vitality) as initial areas of attention for sustained and intense concentration on building effective practices in local churches.**

In every way possible (the subjects of our prayers, the use of time, money, what we watch/report/talk about, etc.), we shall assure that our attention and the flow of resources are directed toward enriching and extending high-quality ministries in and through congregations as the primary arenas for making disciples.*

We must make congregational vitality our true first priority (including how funds collected by the annual conferences and general church are invested and how results are assessed) and choose now to stop or curtail many important and worthy efforts that are depleting resources and are not closely aligned with this objective.

John Wesley was no stranger to hard choices, and he knew well the temptation to settle for that which is merely good, and hence lose the opportunity to pursue that which is best. In Sermon 89, “The More Excellent Way,” he spoke of the need always to take the more rewarding (albeit often more difficult) path: “Who then is a wise man, and endowed with knowledge among you? Let him resolve this day, this hour, this moment, the Lord assisting him, to choose . . . the ‘more excellent way.’”

* See *Paragraphs 201 and 202 in The Book of Discipline 2008*

Key Drivers of Vitality**

- Effective pastoral leadership including aspects of management, visioning and inspiration
- Multiple small groups and programs for children and youth
- Mix of traditional and contemporary worship services
- High percentage of spiritually engaged laity who assume leadership roles

**See appendix 1.

We shall demonstrate profound respect for and then encourage and celebrate diversity in the ways churches apply the drivers of vitality that fit their local contexts. Vitality will take multiple forms in light of varying circumstances. Since rule-bound structures inhibit innovation, continuous renewal, and viability, a key responsibility of leaders is to suspend rules in order to test and assess the efficacy of new, worthy ideas.

2. **Dramatically reform the clergy leadership development, deployment, evaluation, and accountability systems.**

Ephesians 4 teaches us that apostles, prophets, evangelists, pastors, and teachers are gifts given by Christ “to equip the saints for the work of ministry.” Vital congregations require leaders—lay and clergy—who have a passion for making disciples of Jesus Christ for the transformation of the world. Effective pastoral leaders must be selected and trained who in turn encourage the laity to dedicate their gifts in fruitful ways.

Therefore bishops and superintendents must

- Work collaboratively with boards of ordained ministry, seminaries and others to reform the processes for clergy recruitment, training, credentialing and support placing emphasis on greater accountability for ministry outcomes.
- Exercise their responsibilities in ways that reemphasize and assure that the UMC’s paid leadership is competent and accountable.
- Accept no compromise on standards for excellence by discovering, publicizing, and celebrating every illustration of effective congregational leaders.
- Provide ongoing opportunities for mentoring, learning, and receiving support and constructive help to enhance skills and performance.
- Create and implement prompt and humane ways to decline entry to or to arrange exit for persons who lack requisite skills, attitudes, and a proven desire and capacity to improve and meet established standards.
- Teach and show by their own example that good intentions must be coupled with profound dedication to achieving measurable outcomes and the practice of frequent public accountability for measurable results.

3. **Collect, report and review, and act on statistical information that measures progress in key performance areas in uniform and consistent ways across all churches and annual conferences, to learn and adjust our approaches to leadership, policies, and the use of human and financial resources** (this will include indicators such as how congregations and annual conferences are increasing their effectiveness in implementing the three factors of vitality: attendance, growth, and engagement).

Responsibility and accountability to God and to one another require that we gather and share information about outcomes, and the factors leading to desired results as well as to articulating the aspirations and intentions that emerge from our common life and faith.

4. **Reform the Council of Bishops, with the active bishops assuming (1) responsibility and public accountability for improving results in attendance, professions of faith, baptisms, participation in servant/mission ministries, benevolent giving, and in lowering the average age of participants in local church life; and (2) responsibility for establishing a new culture of accountability throughout the church.**

Adaptive change and leadership are not possible without an authentic purpose and vision; powerful, cohesive, guiding coalition; strong standards, and accountability.

A unified Council of Bishops will:

- Annually name current realities and call the Church to specific goals for Ministry
 - Institute and maintain an effective executive management operating function that strategically and practically aligns the resources of the general church in order to focus on increased local church vitality
 - Set performance objectives for each other and regularly measure progress and hold one other accountable, employing sanctions when needed to address under-performance
 - Develop a much stronger sense of connection by aligning the work of the COB with general agencies and denominational initiatives/programs.
5. **Consolidate program and administrative agencies, align their work and resources with the priorities of the Church and the decade-long commitment to build vital congregations, and reconstitute them with much smaller competency-based boards of directors in order to overcome current lack of alignment, diffused and redundant activity, and high expense due to independent structures.**

Part of Wesley's genius in founding and leading the Methodist movement was his ability to focus on what worked. In his Explanatory Notes on the New Testament for 1 Corinthians 14:5, he made *usefulness* a primary virtue: "By this alone are we to estimate all our gifts and talents."

Agencies must be aligned with the priorities of the Church rather than the worthy but different agendas of their separate boards and innovative leaders.

With the exception of base funding essential to assure core capacities, funding should be awarded based on agency proposals to implement Church priorities, with reporting

and auditing to validate results and demonstrate accountability, thus encouraging agencies to collaborate for joint work, funding, and impact.

Anticipated resources and the urgency to increase the number of vital congregations require a near-term reduction in scope and scale of general Church work to regain momentum.

6

Background

The Research

Congregational Vitality

Comprehensive, independent research was conducted using data from multiple sources to gain information about the factors that lead to congregations being more vital as evidenced by attendance, growth, and engagement. The process included rigorous analysis of data on attendance, growth, and engagement from over 32,000 churches in North America, interviews with constituencies across The United Methodist Church, group meetings, and fact-finding and opinion questionnaires administered with diverse stakeholders.

The reliable statistical findings indicate that high-vitality churches come in all sizes, ethnic representations, church settings, and geographies, but they consistently share common factors *that work together* to influence congregational vitality.

The data show that dynamic churches tend to have:

- Effective pastoral leadership including inspirational preaching, mentoring laity, and effective management
- Many small groups and programs, including programs for children and youth
- A mix of both traditional and contemporary worship services, including contemporary music and multimedia in contemporary services
- Effective and spiritually engaged lay leaders, rotating lay leadership, and pastors who work at developing and mentoring lay leaders.

A key finding of the research is that the *combination* of these factors contributes to vitality, rather than any one or two undertaken alone. Other factors include more topical preaching and longer pastoral appointments.

Operational Assessment

A system-wide operational assessment of the connectional church looked at how the denomination is currently using people, money, and processes at the district, annual conference, and general church levels.

The independent assessment was mandated by the Council of Bishops in its charge to the CTA. Findings included the overarching conclusion that the denomination is experiencing a “creeping crisis” of relevance, and although that crisis is influenced by the duress associated with the current economic situation, it is not foremost a financial crisis.

Primary causes are a general lack of trust and confidence among the various parts of the denomination and a perception of distance between local churches, annual conferences, and the general church agencies.

The study indicated areas where improvement is needed:

- Recognition of the value and need for the Council of Bishops to exercise strong and courageous leadership, working in concert and fostering alignment throughout the Connection
- More clarity and understanding about the denomination’s mission, culture, and values (starting with more robust consensus about and passion for the central mission)
- Less perceived organizational “distance” between and among the foundational units of the Church (greater sense of connection, two-way communication, and mutual trust across all levels of the denomination)
- Better-defined leadership roles, responsibilities, and accountability; and improvements in trust (greater clarity about job outcomes and clear accountability for achieving and reporting results)
- More standardized management processes and reporting systems (agreement about which organizational indicator of health we should monitor, tally, and publicly report)
- Streamlining connectional structures, assuring effective governance, lowering costs, and requiring higher levels of quality performance.

According to the report, as a decentralized system the UMC is heavily dependent on agreement about beliefs, shared motives, and compatible ways of working together in order to function in the most productive ways. But frailties in the UMC’s culture, including lack of trust, low levels of mutual respect and the absence of civil dialogue, insufficient clarity about the precise roles and responsibilities of leaders, and lack of agreed ways to measure success or assure collaboration are corroding our connections.

Adaptive Challenge

Our analysis leads us to conclude that the essential adaptive challenge confronting The United Methodist Church is:

*To redirect the flow of attention, energy, and resources to an intense concentration on fostering and sustaining an increase in the number of **vital congregations** effective in making disciples of Jesus Christ for the transformation of the world.*

To do so requires that we:

- Identify and enhance the factors essential to change our mindset so that our primary focus and commitment is on fostering and sustaining *congregational vitality* (vitality is a dynamic forward-leaning state of engagement that connects people to God, each other, and the world in profound ways), celebrating and using success to guide us
- Articulate and commit to newly clarified and dramatically higher performance expectations for all levels of the church
- Expect and provide courageous, accountable leadership that assumes responsibility for upsetting current paradigms and shaping and adopting new understandings that result in more effective practices—and that this begin with the bishops (both as individuals and collectively as the Council of Bishops)
- Institute and report measurable performance results in all sectors of the connection on an ongoing and regular basis, enabling us to learn and adjust the ways we invest and use our talent, time, and money.

Actions That Will Lead to Reordering the Life of the Church

- 1. Refocus a higher share of resources and attention on congregations to promote and cultivate the drivers of vitality.**
 - Direct leadership and funding to a **decade-long investment with the goal to dramatically increase the number of vital congregations.**
 - Implement demonstration projects in annual conferences where interest and commitment are high, providing as needed matching funds to support learning, experimentation and regular and widespread reporting of results.
 - Build from pockets of achievement and learning by giving them high visibility and establishing teaching centers that will emphasize peer-to-peer support for new ventures in other locales.
 - Develop and implement comprehensive strategic initiatives that identify and then redeploy underperforming assets (real estate, invested reserves) and combine with allocations of annual revenue in order to invest in the places demonstrating and fostering vitality.

- Offer persuasive and attractive encouragement and action-options for action to congregations and annual conferences by publishing information about what works and how, creating networks of resources for change management, dedicating necessary leadership, and investing money.
- Use rigorous evaluation procedures, apply lessons learned, report frequently, learn from mistakes, and celebrate success.

2. Become as passionately driven by accountability and results as we are by intentionality.

- Establish, create training and support for, and hold fast to church-wide, uniform standards for all clergy (deacons, elders, and bishops). Set and use high expectations as guiding criteria in recruitment, selection/elections, managing transitions into new roles, development/supervision, and regular results-based performance evaluations with mechanisms for remediation when needed.
- Set *specific outcome results* (including means of measuring and reporting) for **all** congregations, annual conferences, agencies and their governing boards, the Council of Bishops, and other professional leadership. Standardize collection of data and regular public reporting of results.
- Discontinue “guaranteed appointment” and consider ways to ease the deployment of talented personnel (clergy) across annual conference boundaries to assure access to the greatest talent for places where there is readiness and need.
- Work to institute an integrated, well-managed, and accountable system of clergy care with standard practices and strong oversight for how clergy are recruited, prepared, deployed, developed, and supervised.
- Establish preferential relationships with seminaries preparing clergy who are equipped and aligned for higher levels of achievement in leadership related to the key drivers of congregational vitality.

3. Streamline, reduce “distance,” and achieve higher levels of alignment throughout the Church.

- The Council of Bishops must reform its structure and processes so that active bishops have effective mechanisms for denomination-wide strategic planning, are able to give concerted attention to fostering congregational vitality, and assume appropriate and principal responsibility for rebuilding and sustaining strong bonds of trust across all levels of the Connection.
- Reconceive the general church and annual conference funding schemes so that revenue and expense align with the emphatic concentration on supporting congregational vitality.
- Establish a general church executive function that carries responsibility, authority, and accountability; employs and deploys general church executives; allocates resources in keeping with needs and desired outcomes; and resolves

disputes. This is a way to provide for more agile, responsive, integrated, timely, results-based, ongoing operations and management, and allowing the General Conference to concentrate on its uniquely *legislative* purpose/role.

- Focus a reduced number of general agencies on resourcing the full set of indicators of congregational vitality to make disciples of Jesus Christ and transform the world, to provide ongoing church-wide leadership recruitment and development, and to fulfill in behalf of the Church those few key functions that are best managed corporately in behalf of the whole.
- Simplify governance structures of general agencies with smaller, competency-based board memberships and clearer differentiation between the policy/fiduciary/generative board functions and ongoing management functions.
- Provide base funding to the reduced number and size of agencies, with competitive access to substantial performance-based financial grants, and specifically using criteria that is tightly aligned with increasing congregational vitality.
- Reduce the “distance” between entities in the Connection in order to increase the quality of relationships and deliver substantial gains in efficiencies and effectiveness.
 - Redeploy resources gained from a reduction of the number and size of general agencies to increase resources available to provide immediate and relevant personnel and other assistance to districts and other groupings of congregations.
 - Reconceive general church-funding schemes, instituting more choice for annual conferences and congregations and attracting the needed funds for local, regional, national, and global efforts through quality performance and effective marketing.
 - Experiment with the ways we structure and set boundaries for conferences and districts in order to better connect churches in collaborative ministry or shared characteristics rather than only on the basis of geographic location.

Road Map for Adaptive Change

The mission of the Church is to make disciples of Jesus Christ for the transformation of the world. Our key strategy is to increase the number of vital congregations.

What is needed?

To carry out its mission, The United Methodist Church must:

- Tell the story of the UMC's adaptive challenges, outlining proposed changes from relevant work groups (CTA, Worldwide Mission, Ministry Study, Connectional Funding, Church Systems, etc.).
- Clarify the *who*, *what*, and *when* for leadership activities and responsibilities that do NOT require legislative action and call for that work to begin in earnest now.
- Determine what legislation is required and who will prepare and sponsor it for General Conference 2012.
- Fashion a plan to lead/manage Church-wide adaptive change starting in 2010 and continuing through 2020.
- Assure fast-track consultation with the COB, CT, GCFA, and all other general agencies to fashion a 2013–2016 general Church funding and budget plan to be submitted in time for consideration by 2012 General Conference. (This would be a second option, submitted alongside the plan now being prepared by these groups that is predicated on greater continuity with current structures and practices).

Steps Forward

Establish an Interim Operations Team to guide change management in order to:

- *Integrate* strategic planning and utilization of resources for effectiveness and efficiency
- Focus on a few strategic initiatives for greatest impact
- Bring Council of Bishops (annual conferences) and agency resources (general Church) into shared planning cycle
- Increase peer accountability for outcomes without centralizing power

A small, diverse team accountable to COB/CT should be competency based for policy oversight plus employment of an Executive Coordinator with the authority and staff necessary to identify issues, and to develop and implement work plans in stages leading up to and beyond the 2012 General Conference. This team of five persons will be named by a selection committee made up of two bishops, two CT members, the President of the COB, and the Chair of the CT and affirmed by vote of the COB and CT.

With the guidance of the Operations Team:

The Council of Bishops will:

- Initiate reform with the active bishops assuming (1) responsibility and public accountability for improving results in attendance, professions of faith, baptisms, participation in servant/mission ministries, benevolent giving, and lowering the average age of participants in local church life; and (2) establishing a new culture of accountability throughout the Church.
- Develop Church-wide strategic plan of action and mutual accountability to assure that attention and the flow of resources are directed toward:
 - Increasing the numbers of people participating in worship and small groups for prayer and study—starting and maintaining more programs for children and youth
 - Encouraging spiritually devoted lay persons to share leadership roles in every facet of Church life
 - Offering multiple worship experiences and cultivating dynamic topical preaching
 - Identifying and cultivating attributes of effective pastoral leadership
 - Providing longer clergy appointments where it is apparent that the gifts of the pastor fit the needs of the church and its community
 - Cultivating incremental increases in financial giving and engagement in outreach, witness, and mission in local communities and the world.
- In consultation with annual conferences, seminaries, and agencies, set in motion reforms and legislative proposals to retool the culture and systems of clergy recruitment, training, credentialing, and that place emphasis on greater accountability for outcomes.
- In consultation with annual conferences, agencies, and others, advance work to standardize and centralize the collection and regular publication of progress updates for churches, pastors, district superintendents, annual conferences, bishops, and general agencies, as well as to provide for regular public reporting and discussion of implications.

- In consultation with annual conferences, agencies, and others, plan for continuing periodic congregational research and the reporting of findings to aid leaders in understanding and responding to trends, to learn about and adopt best practices and to foster high expectations for continuous learning and adaptation.

The General Agencies will:

- Collaborate with all parties to initiate actions and, where needed, legislation to consolidate program and administrative agencies, align their work and resources with the priorities of the Church and the decade-long commitment to build vital congregations, and reconstitute them with much smaller competency-based boards of directors in order to overcome current lack of alignment, diffused and redundant activity, and high expense due to independent structures.
- Begin in earnest to frame our view of agencies *as portals* and *networks* that link local experts in order to
 - Use technology and social media to expand agency work with lower overhead
 - Generate less *proprietary* work by agency staff, and provide opportunities for more *open source* resourcing
 - Encourage the creation and implementation of more program initiatives and policies by practitioners and experts *in the field* rather than by agency staff and directors
 - Increase the mission by *multiplication* not *expansion*; *viral* not *linear*
- Move to a financial/budget plan that funds *functions* not *structures* in order to
 - Respond more nimbly to emerging needs and opportunities
 - Tie up fewer resources in capital, and utilize more resources for mission
 - Build trust in stakeholders by demonstrating and emphasizing results
 - Move from funding agency (portfolio) plans to funding integrated Church-wide plan
- Begin the process of changing expectations and practices, and as possible, disciplinary requirements, so that we shift our understanding and expectations for the governance of agencies from a *constituent/representative* focus to an *operations/outcomes* focus in order to
 - Have fewer people preoccupied with matters of *operations*; but many more engaged in the work of *ministry*
 - Utilize constituents as *stakeholders & partners* rather than as *representative directors*
 - Focus more on *outcomes* than on inputs and activities

8

Frequently Asked Questions

CTA Project

What is the purpose of the Call to Action Project?

The council of Bishops and the Connectional Table authorized and funded a team to lead the next phase of the Call to Action journey that began in May 2009. The new Call to Action Steering Team was charged with receiving and reviewing the data previously gathered by the first CTA Committee and generating a response based on the results of its research and assessments.

The Steering Team was charged with bringing forward a plan that will lead to reordering the life of the church for greater effectiveness and vitality in:

- The mission of making disciples of Jesus Christ for the transformation of the world
- Addressing the Four Areas of Focus endorsed by the 2008 General Conference as distinctive ways we live into the mission together.

When will the final recommendations from the Call to Action Project be available and where can we find them?

The Call to Action recommendations will be presented to the Council of Bishops in early November and to the Connectional Table in mid-November. The final report of recommendations will be posted at www.umc.org/calltoaction.

Who or what group will be responding to the final recommendations and determining what actions need to be taken?

The Call to Action recommendations will be presented to the Council of Bishops and the Connectional Table. They will respond to the report and determine the next steps.

What was the cost of this project?

The cost of the Call to Action Project was funded through a grant of \$500,000 from the Connectional Table.

How was the Call to Action Project funded?

Funding for the Call to Action Project came from the Connectional Table.

Does the CTA's emphasis on congregations and congregational vitality represent a retreat from seeing the world as our parish and from the need to sustain robust connectional structures? Is the congregational focus too parochial and might it dilute our expansive reach, through which we engage the world and its principalities and powers?

Vital congregations provide “the most significant arena through which disciple-making occurs . . . Under the discipline of the Holy Spirit, the church exists for maintenance of worship, the edification of believers, and the redemption of the world” (Par. 201, *The Book of Discipline 2008*).

“The church of Jesus Christ exists in and for the world. It is primarily at the level of the charge consisting of one or more local churches that the church encounters the world. The local church is a strategic base from which Christians move out to the structures of society” (Par 202 *2008 Book of Discipline*). Other components of the Connection support and extend from congregations as the base (for example, “The purpose of the annual conference is to make disciples of Jesus Christ for the transformation of the world by equipping its local churches for ministry and by providing for ministry beyond the local church; all to the glory of God”: Par. 601, *The Book of Discipline 2008*).

Rather than viewing the different points in the Connection as building blocks in the shape of a pyramid (where we could easily place congregations at either the top or the bottom), we envision the Connection as a web of interconnections. In that view congregations are rightly seen as *essential* points for ministries of “gathering, transforming, and launching” as part of a dynamic, strong, and effective connectional system. They are not the only settings or structures that matter, but they are crucial. They are the principal places where people experience, proclaim, and bear witness to the good news and learn to care deeply about and respond to the hunger and hurts of the world.

The concept of “thinking globally, acting locally,” which is widely used in cultivating values and practices in environmental concerns, fits well with John Wesley’s vision of embracing the world as our parish while staying rooted in an intimate relationship with God enriched by the disciplines of accountability groups and the worship and serving ministries of congregations.

The Call to Action effort sees the need and benefit of robust, effective, and well-managed connectional structures and processes that are strongly aligned with the mission of the church and extend the reach and impact of vibrant congregations.

Congregational Vitality

Where can I find the final report from Towers Watson on Congregational Vitality?

The final report on Congregational Vitality can be found in appendix 1 or at www.umc.org/calltoaction.

Where can I learn about the methodology used to perform the research and data analysis for the Congregational Vitality Project?

The research methodology can be found in appendix 4 or at www.umc.org/calltoaction.

Why was it necessary to conduct our own research project on vital congregations rather than using research that already existed?

Although a number of studies existed, the Call to Action Steering Team felt strongly that we needed an independent, objective, and comprehensive study performed exclusively on the UMC, using the same data collection and analysis techniques for all parts of the research. The research study needed to be representative (findings apply across all of the population) and reliable (findings that would be replicated if we did the study again). This might not be true if pieces of the study were taken from already existing research.

How were the drivers of congregational vitality determined?

Working with the Call to Action Steering Team, Towers Watson used a combination of surveys, interviews, church visits, and analysis of available data to identify potential drivers and indicators of vitality. As expected in a system as large and complex as the UMC, there were a range of working definitions for what should and does constitute the evidence of congregational vitality, many of which cannot be measured directly using objective, observable metrics. In order to be used as an indicator of church vitality, a measure had to meet these criteria:

- **Descriptive**—the measures had to provide graphic illustrations of an aspect of church life, leadership, or processes that people recognize as important and understand.
- **Differentiating**—the measures used had to be more common in churches with high vitality than in churches with low vitality.
- **Quantifiable**—the measures used had to be something that can be objectively measured, rather than subjectively assessed. Objective, quantifiable measures avoid the risk of biases that are likely when using subjective measures.
- **Available**—the measures must have available data for at least three to five years across the UMC North American churches. There were many metrics that otherwise could have been useful indications of vitality, but they were either based on information that was not collected on a consistent basis across the five jurisdictions or had not been collected over a long enough period to allow sufficient time to establish trends.

Towers Watson calculated a vitality index for each church, based on indicators of vitality identified by the Steering Team. Based on this index, Towers Watson conducted regression analysis with the 127 potential drivers to identify drivers that positively impacted vitality.

What were the key drivers of vitality?

Four key drivers of vitality stood out, and they were consistent across different types of churches. They were:

1. Small Groups and Programs (Small groups include study, fellowship, and service; programs include classes and other activities.)
 - a. Number of Groups—High-vitality churches have more small groups
 - b. Children and Youth Programs—Regardless of church size, vital churches have more programs for children and youth.
2. Lay Leadership
 - a. Effectiveness—demonstrate vital personal faith, rotate in/out
 - b. Specific programs and involvement—more attendees serving as lay leaders
3. Worship Service
 - a. Provide a mix of traditional and contemporary
 - b. Specific aspects—More topical preaching in traditional services instead of lectionary-based. In contemporary services, highly vital churches are more likely to use contemporary music and multimedia.
4. Pastor
 - a. Excellence in key attributes
 - i. Focusing on developing, coaching, and mentoring lay leadership
 - ii. Influencing the actions and behaviors of others to accomplish change in the local church
 - iii. Propelling the church to set and achieve goals
 - iv. Inspiring the congregation through preaching
 - b. Appointment length

How do you distinguish between drivers of vitality and the indicators or results of vitality?

Drivers of vitality are the factors that directly impact or cause the desired state: vital churches.

Results of vitality, or indicators of church vitality, are what indicate that the desired state has been achieved. They are objective, observable, and measurable results. The seven results/indicators of vitality used to determine the drivers of vitality were:

1. Average worship attendance and a percentage of membership
2. Total membership
3. Number of children, youth, and young adults attending as a percentage of membership

4. Number of professions of faith as a percentage of attendance
5. Number of professions of faith as a percentage of membership
6. Annual giving per attendee
7. Financial benevolence beyond the local church and a percentage of the church's budget

Towers Watson used these measures both at a single point in time and to examine the trends in these measures over a multiple-year period.

How were the potential drivers of congregational vitality determined and where can I see a list of the drivers tested?

Towers Watson used a combination of surveys, interviews, church visits, and analysis of available data to identify 127 potential drivers of vitality. The potential drivers were then tested to identify relationships between factors and outcomes. The list of potential drivers can be found in the appendix to the final report (appendix 5) or at www.umc.org/calltoaction.

How many churches were included in the congregational vitality research?

Almost 18,000 churches (17,943) were invited to participate in the Congregational Vitality research. Twelve percent, or 2,208 churches, responded and completed surveys to identify potential indicators of vitality. In addition, with assistance of GCFA (General Council on Finance and Administration) Towers Watson was provided with a five-year history for over 32,000 churches so they could apply each of the indicators of vitality.

How were churches selected to be a part of the congregational vitality research?

A random sample of 17,943 churches in North America was invited to participate and complete the survey. Data analysis was performed on all of the 32,228 United Methodist Churches in North America who had submitted data to GCFA.

Who was surveyed for the congregational vitality research and how were they selected?

All Bishops and District Superintendents in North America were invited to complete the surveys. In addition, a random sample of pastors, churches, and Staff-Parish Relations Committee members were invited to complete the surveys.

Did the congregational vitality research include all UM Churches?

The congregational vitality research included UM Churches in North America.

How many vital congregations were identified?

Approximately 15% of the 32,228 churches (4,961 churches) scored high in vitality based on the vitality index.

Can we find out how specific churches were rated on the congregational vitality research?

To assure confidentiality and avoid seeming to grade individual churches, Towers Watson has kept the vitality index of each church strictly private.

Was there a consistent profile of the congregations that were identified as vital?

No, all kinds of UMC churches are vital—small, large, across different geographies and church settings (e.g., urban, rural).

What attributes were evaluated to identify the leadership effectiveness of the pastor?

Fourteen attributes of pastor leadership effectiveness were evaluated:

1. Working in partnership with others (e.g., lay leaders, congregation) to accomplish goals
2. Recognizing, addressing and managing discord in a fair and positive manner
3. Encouraging and empowering others to take ownership
4. Focusing on developing, coaching, and mentoring to enable lay leadership to improve performance
5. Inspiring passion and enthusiasm in others for spiritual development, discipleship and outreach
6. Developing personal knowledge, skills, and abilities to continuously improve and grow oneself
7. Defining and articulating a future vision for the local church
8. Inspiring confidence and trust through words and deeds
9. Demonstrating effective management of the local church (e.g., financial, operational, staff)
10. Influencing the actions and behaviors of others to accomplish changes in the local church
11. Recognizing, understanding, and empathizing with the feelings and needs of others and responding accordingly
12. Propelling the local church to set and achieve significant goals through effective leadership
13. Understanding and leading in the context in which they serve
14. Inspiring the congregation through preaching

How do we know that the results of the congregational vitality research are statistically reliable?

Representation included each conference in North America, churches of all sizes, churches of all levels of vitality, and churches from ethnic minorities. Based on the number of responses, there was a 95% confidence level in the results, with a margin of error of +/- 2 percentage points. The findings apply across the whole North American UMC population and would be replicated if the study were done again.

Who defined the characteristics of vital congregations?

Key points:

- We used the data mining method that sifts through thousands of facets of information in order to learn and verify what contributes to congregational vitality.
- This required making distinctions between congregations in order to compare activities/leadership factors that are significantly more prevalent in those churches that score high on the vitality index.
- The vitality index relies on objective and observable data rather than anecdote or subjective assessment. This requires use of the best available statistical indicators to represent (stand in for) vitality. We used available information (such as average worship attendance over five years, professions of faith over time, financial giving/investment in benevolent ministries beyond the local church, etc.)
- Having identified @ 5,500 UM churches scoring high in vitality we tested hundreds of factors (activities/leadership/processes) to find which appeared in significantly greater instances in the high vitality churches compared to 28,000 other churches.
- This produced information about four key areas that are statistically significant drivers (contributors) of vitality along with details about each (Small Groups & Programs, Lay Leadership, Worship, the Pastor)

Church vitality is not a static state. No matter which attributes are considered most important, relevant, or instrumental, congregations are by nature organic and affected by spiritual, social, demographic, economic and other factors that are constantly in flux. Identifying drivers of vitality and pursuing them with excellence will result in welcome outcomes, but the process is never complete nor are the outcomes permanent.

Vitality is a dynamic and forward leaning state of engagement that connects people to God, each other, and the world in the most profound ways. It is achieved through energetic and thoughtful ongoing pursuit. Theologically, we understand congregational vitality as requiring the desire and discipline of moving on to perfection that John Wesley described. Organizationally, we understand that the drive to vitality is achieved through a process of continuous improvement like that outlined by W. Edwards Deming.

Most faithful participants, leaders and observers have direct experience that informs their convictions and expectations about what contributes to and constitutes church vitality. Given the rich diversity of places and people, there are many (and sometimes competing) assertions about what vitality looks like and how to achieve it.

The Call to Action Steering Team worked with the international consulting firm, Towers Watson to draw on the insights of a wide cross-section of United Methodists representing all points in the Connection (local, district, conference, and general church) in North America to identify a cluster of indicators that would provide reasonably standard and reliable ways to measure vitality. The Steering Team did not look for any single and limiting fixed definition of vitality but instead sought to find measurable indicators that point toward (and like a thermometer give us a “reading” about) a reality that could otherwise remain hidden from view.

The Steering Team employed criteria for selecting indicators that would aid in providing an objective, quantifiable review to help differentiate those churches with good intentions and activities from those with measurable desired outcomes. This made it necessary to decline to make use of many indicators that are obviously important clues for identifying effective congregations, and choosing instead indicators that were **descriptive** of aspects of church life that are recognized as important; indicators that help **differentiate** high performing churches from their counterparts; indicators that are both **available** through regular reporting over time and that can be objectively measured (**quantifiable**).

This process led to selecting seven valid indicators:

We acknowledge that these indicators of vitality are stand-ins. They are not viewed as an all inclusive list of factors to be observed and used when looking for proof of congregational vitality. But they are reliable, descriptive, available and quantifiable and help us differentiate higher and lower performing churches.

- Average worship attendance as a percentage of membership
- Total membership
- Number of children, youth, and young adults attending as a percentage of membership
- Number of professions of faith as a percentage of attendance
- Numbers of professions of faith as a percentage of membership
- Annual giving per attendee
- Financial benevolences beyond the local church as a percentage of the church’s budget

Because vitality itself is a moving target, and given that the CTA Team sought to isolate those indicators that are **descriptive, differentiating, available** and **quantifiable**, it is not our intent to say these are the only important indicators.

Rather, we assert that these factors are consistent with widely shared views about what constitutes church vitality, they are found consistently in churches across geographic and demographic boundary lines, they are linked to critically important values embedded in our common mission and they are regularly monitored and reported over time. Thus these indicators are useful and reliable signs (stand-ins) for assessing the relative vitality of a given church.

We wanted to differentiate between more vital or less vital churches so that we could look more closely at the high performers and determine what *drivers* (programs, structures, leadership, etc.) are most readily and repeatedly found in the congregations that measure in the top third in terms of the vitality *indicators*.

To do so we sought and compared information on 130 factors about each church that were generated through widely circulated surveys, interviews and the work of the Steering Team and represent probable elements for fostering vitality. With a high degree of statistical reliability this resulted in mapping significant distinctive variations that are consistently prevalent in vital congregations.

This approach gave us a credible way to identify and learn from the most vital churches (about 5,500 of 33,000) looking at the data both at single points in time and over several years. But we do not desire or claim to have the definition of vitality stored neatly in a box. We affirm that vitality is a dynamic and forward leaning state of engagement that connects people to God, each other, and the world in the most profound ways. It is achieved through energetic and thoughtful ongoing pursuit.

We confidently assert that there are ways to helpfully differentiate high from lower performing churches and then to uncover in objective and reliable ways some of the key drivers (programs, structures, leadership) that are repeatedly and reliably found in the higher performing churches. This in turn provides evidence for those with eyes to see of what several critically important interventions/actions when taken fostering the desired vitality.

Our findings are not the silver bullet or single lever for effecting change that will fulfill our calling or address all current and emerging challenges. The Church Vitality research project provides one important angle of vision for gaining insight about what can be done to increase effectiveness. It stands along side of our rich and comprehensive understandings of the Church and God's calling, our identify as part of the body of Christ, our grounding in Scripture, tradition and experience and our reliance on the work of the Spirit to shape, guide and hold us.

This research is obviously not the last word, but we believe it is an incredibly valuable and informative tool that we can choose to use in advancing our mission, recognizing that congregations are the primary arenas for making disciples of Jesus Christ for the transformation of the world.

Isn't the Towers Watson research similar to an opinion survey?

A careful reading of the methodology employed in the Vital Congregations research by Towers Watson (see appendix 4 or <http://umc.org/calltoaction>) shows a deliberate step-

by-step, building-block process that uses massive amounts of data about what churches are actually doing and achieving, not simply what observers “say” they are doing or have theories about. Opinions were sought in the early stage to gather wide-ranging views of leaders (lay and clergy, local and connectional) about what indicators might be used to demonstrate and measure local church ministry outcomes. These views helped to inform and expand the thinking of the Steering Team and Towers Watson as they considered available statistical data from long-standing reporting records for all churches that are maintained by the General Council on Finance and Administration. Questionnaires (sometimes confused with opinion surveys) were used to collect additional information that was then cross-checked and compared with independent sources of data. The results that generate the findings from the Towers Watson Congregational Vitality research are based on careful analysis of hundreds of thousands of data points using proven, objective research techniques to evaluate statistical information.

Why was so much money spent to find out results that are so patently obvious?

The CTA mandate called for the use of an independent, qualified, outside expert to conduct the operational assessment of UMC structures and processes (districts, annual conferences, and the general church). The Steering Team decided early on that, given the primary role of congregations in the work of making disciples of Jesus Christ for the transformation of the world, a no less rigorous, independent, and objective approach should be used in determining best practices for building and sustaining congregational vitality and effectiveness. The existence of many competing views on the subject that are expressed in books, theories taught by leaders, and in various programs reinforced the value of investing in unprecedented data-mining research—as contrasted with opinion gathering—that objectively and systematically uses massive amounts of data to determine cause and effect relationships. That the results are similar to some conventional wisdom and theories is the good news, as are the results that challenge some of our perceptions. This gives us opportunities to build on the practical learning of many across the Church. The added benefit is that we now have a presentation of complex data with informative findings that have been verified by a thoroughly independent and objective group of experts using state-of-the-art research tools.

Operational Assessment

What was the purpose of the UMC Operational Assessment Project?

The purpose of the CTA Operational Assessment Project was to evaluate the leadership and governance structures and processes of the UMC to identify primary opportunities or “levers” that will:

- Support the attributes of a vital connection for the twenty-first century
- Improve decision making, implementation effectiveness, and accountability
- Improve affordability and align resources with the determinates of church vitality and the Four Areas of Focus

The project was in support of the Call to Action Steering Team’s charge of “bringing forward a plan that will lead to reordering the life of the church for greater effectiveness and vitality in (1) the mission of making disciples of Jesus Christ for the transformation of the world and (2) addressing the Four Areas of Focus as distinctive ways we live into that mission together.”

Why was Apex selected as the firm to perform the operational assessment?

Apex was selected because of their experience in evaluating leadership and corporate governance in large nonprofit systems.

Where can I find the Apex report on the UMC Operational Assessment?

Apex’s final report on the Operational Assessment can be found in appendix 8 or at www.umc.org/calltoaction.

Where can I find the methodology for the Operational Assessment Project?

The methodology for the Operational Assessment Project included:

- Independent analysis of the Church’s leadership and governance structures and processes.
- An environmental assessment of the UMC (see appendix 9).
- Background financial and operational information interviews and information requests.
- Formal Project interviews (see appendix 9).
- A Project Survey (see appendix 9).

More detail on the methodology can be found in Apex’s final report, with additional information in the Appendices at www.umc.org/calltoaction (appendix 9).

Who was interviewed for the Operational Assessment Project and what questions were asked?

For a complete list of persons interviewed for the Operational Assessment Project and the interview protocol, see appendix 9 of Apex's final report, also found at www.umc.org/calltoaction.

How were survey respondents selected for the Operational Assessment Research?

The Operational Assessment Survey was designed to provide a source of general quantitative feedback from the Church's broad leadership regarding environment assessment (understanding of the church's environment and circumstances, need for change and change readiness) and an assessment of the effectiveness of the Church's structures. For a complete list of persons invited to participate in the survey, see appendix 9 of Apex's final report, also found at www.umc.org/calltoaction.

Where can I find a copy of the Operational Assessment survey?

For a copy of the Operational Assessment survey, see Appendix C of Apex's final report at www.umc.org/calltoaction (see also appendix 9).

What has happened with the Four Areas of Focus?

The Four Areas of Focus that were keenly affirmed at the 2008 General Conference and across the connection since then, serve as important examples of our reality, potential, and dilemmas.

The themes resonate strongly with our hearts and minds as emphatic expressions of social holiness. There is no ambiguity across the Connection about how deeply these emphases are rooted in the gospel or how vividly they exemplify the shared aspirations and commitments of the people called Methodist.

And there are many examples of intentional, rich, and useful work at different points in the UMC Connection that evidence living into these commitments. Also, thankfully, there appears to be ample freedom for relevant initiatives to emerge without burdensome bureaucratic constraints.

But the emergence of the Four Areas of Focus as organizing themes for our ministries in making disciples of Jesus Christ for the transformation of the world also illustrates that despite the heartfelt consensus that surrounds these intentions, the work is often disconnected, of varying quality, and characterized by sometimes unspecified and uncertain outcomes.

Many United Methodists look puzzled when asked about the Four Areas of Focus; even some of the vocabulary used in naming the areas has "evolved" during the quadrennium. The primary locus for planning and coordinating is unclear (what is the role of the COB as contrasted with CT and various general agencies?), and while several groups have been rigorous and transparent in identifying outcomes and performance measures, it is not apparent nor is there consensus about who should make judgments about inevitable trade-

offs, the adequacy of interim decisions/results, or the priority to be given in the allocation of resources.

We join many who bristle at some of these descriptions because the criticism seems to discount the earnest, good work that is underway and can be documented. Nevertheless, we ask:

- What are the strategic plans for each of the Four Areas for the quadrennium and beyond? Who decides? Who implements? Who evaluates? Who makes needed mid-course corrections?
- To what degree are the Four Areas of Focus the deliberate and central planning framework for each of the annual conferences or for a majority of local churches? How is the ensuing work supported, perfected, and evaluated?

We do not find that the answers are easily ascertained or that there is clear agreement about the answers among UM leaders. There is no doubt that there exists a desire for integration and coordination and that there are values related to our mission and vision that are widely shared. But as the Apex report has found, what is sorely lacking is sufficient clarity in what is meant by commonly used catchphrases, and accountability in the ways we align people, money, and processes.