

# **UMC Call to Action: Vital Congregations Research Project**

**Findings Report for Steering Team**

**June 28, 2010**

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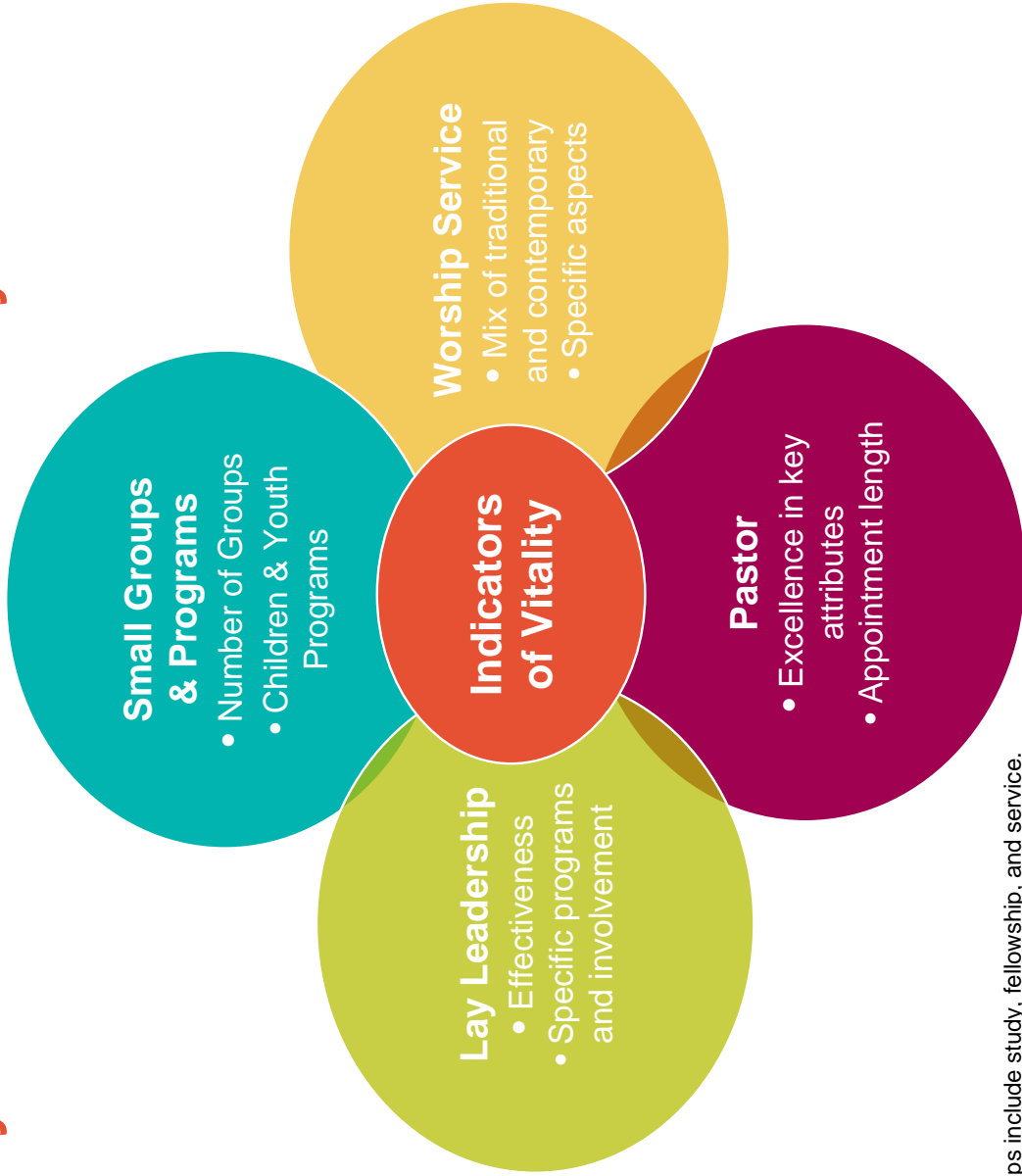
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## Executive Summary

- Towers Watson conducted comprehensive, robust research (using proven data collection and analysis techniques) on data from various sources and types of surveys across North America
  - Response rate to the surveys was good, which ensures the findings are reliable at a 95% level of confidence
- Towers Watson calculated a vitality index for each church based on indicators of vitality identified by the Steering Committee
  - Calculation was done for churches where data were available (n=32,228)
  - Also calculated three sub-factors of vitality – attendance, growth and engagement
- Based on vitality index, Towers Watson found that all kinds of UMC churches are vital – small, large, across different geographies, and church setting (e.g., urban, rural)
- Towers Watson conducted regression analyses to identify drivers of the vitality index and four key drivers of vitality stand out – crystal clear findings that are actionable
- The four key drivers of vitality are fairly consistent across different types of churches

# Four key areas are the drivers of vitality



**Note:** Small groups include study, fellowship, and service.  
Programs include classes and other activities

# Driving different factors of vitality

Driver	Overall Vitality	Attendance Factor	Growth Factor	Engagement Factor
<b>Small Groups</b>				
Number of small groups				
Number of programs for children				
Number of programs for youth				
<b>Lay Leadership</b>				
Effectiveness of lay leadership				
Lay leadership demonstrating vital personal faith				
Rotating lay leadership				
% of attendees serving as leaders in past 5 years				
<b>Worship Service</b>				
Mix of Traditional and Contemporary service				
Using more topical preaching in Traditional service				
Using more contemporary music in Contemporary service				
Using more multi-media in Contemporary service				
<b>Pastor</b>				
Focusing on developing, coaching and mentoring to enable lay leadership to improve performance				
Influencing the actions and behaviors of others to accomplish changes in the local church				
Propelling the local church to set and achieve significant goals through effective leadership				
Inspiring the congregation through preaching				
Length of appointment				

Denotes the driver has a positive impact on the factor of vitality



**Project Methodology**



# Research project methodology

## February

### Establish Foundation

- ✓ Launch the process (project team and steering team)
- ✓ Identify key stakeholders
- ✓ Develop communication plan and messages
- ✓ Identify key performance outcomes
- ✓ Assess existing data sources

## February - March

### Develop Hypotheses

- ✓ Select interviewees
- ✓ Develop interview guide and conduct interviews
- ✓ Identify churches for observation
- ✓ Develop observation guide and conduct visits
- ✓ Develop hypotheses based on findings
- ✓ Review hypotheses with steering team

## March - May

### Gather Data and Test Hypotheses

- ✓ Evaluate quality and availability of data
- ✓ Gather existing data
- ✓ Collect additional data
- ✓ Analyze data
- ✓ Develop model to predict church performance outcomes

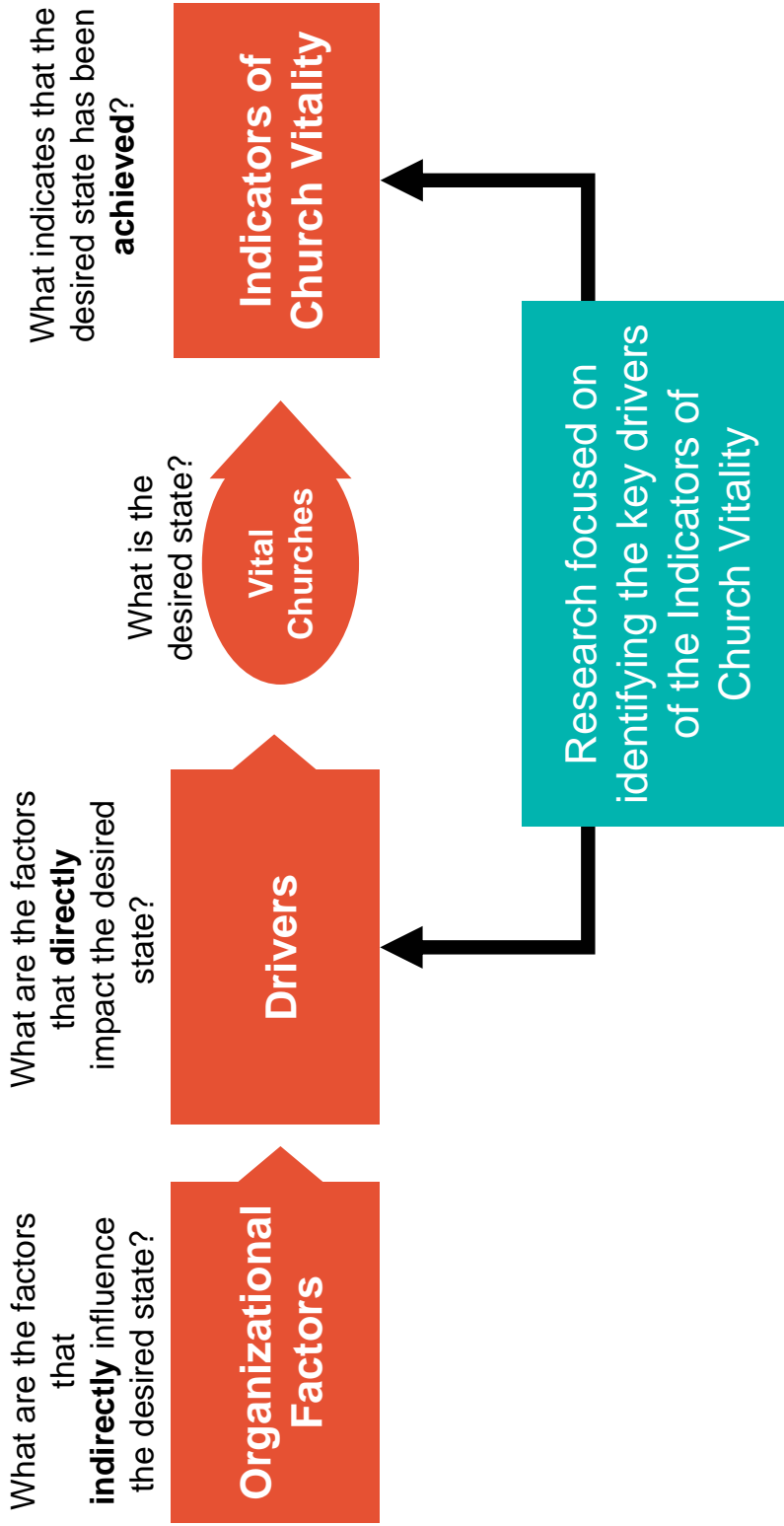
## May - June

### Finalize Findings

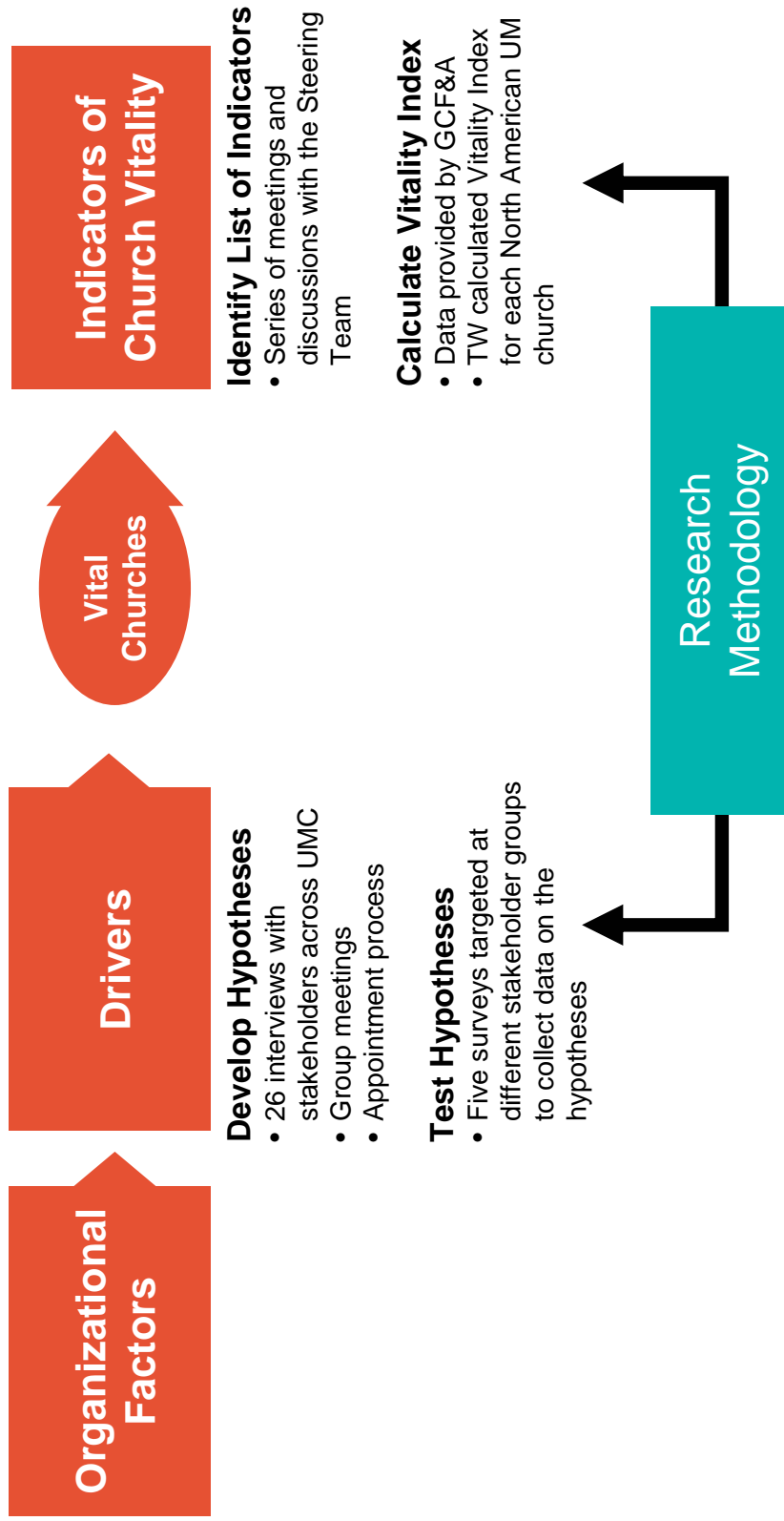
- ✓ Draft research findings based on model
- ✓ Meet with project team to refine research findings
- Test research findings with steering team
- Deliver final research report

## Guiding Principles: Inclusive, Practical, Fact-based Insight and Decisions

# Research model



# Research model (continued)





# Testing hypotheses

Survey	Type and Number of Questions
Bishop Survey	<ul style="list-style-type: none"> <li>9 questions measuring potential drivers such as:               <ul style="list-style-type: none"> <li>Appointment process</li> <li>Conference programs focused on vitality</li> </ul> </li> </ul>
District Superintendent Survey	<ul style="list-style-type: none"> <li>5 questions measuring potential drivers such as:               <ul style="list-style-type: none"> <li>Time allocation</li> <li>Managing performance of Pastors</li> </ul> </li> <li>14 questions measuring a sample of their Pastors on aspects of leadership</li> </ul>
Pastor Survey	<ul style="list-style-type: none"> <li>22 questions measuring potential drivers such as:               <ul style="list-style-type: none"> <li>Personal demographics (age, length in current appointment, etc.)</li> <li>Laiety leadership</li> </ul> </li> <li>9 questions measuring aspects of different types of worship services</li> </ul>
Church Survey	<ul style="list-style-type: none"> <li>54 questions measuring potential drivers such as:               <ul style="list-style-type: none"> <li>Church programs offered and attendance in those programs</li> <li>Laiety leadership</li> <li>Congregation</li> <li>Worship</li> </ul> </li> </ul>
SPRC Survey	<ul style="list-style-type: none"> <li>15 questions measuring their Pastor on aspects of leadership</li> </ul>

## Testing hypotheses (continued)

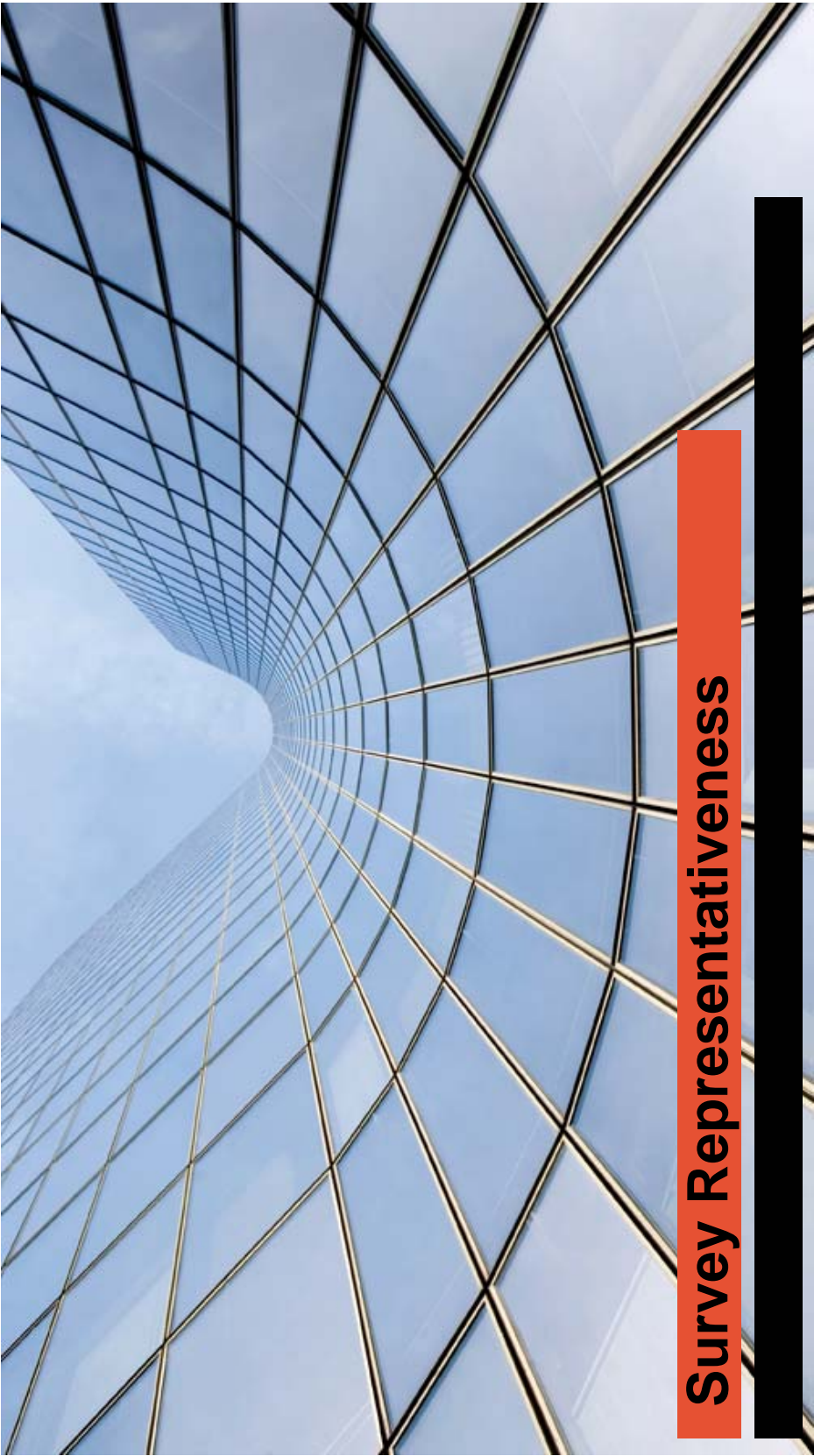
Survey	Who Was Asked to Take the Survey?
Bishop Survey	All Bishops – North America
District Superintendent Survey	All District Superintendents – North America
Pastor Survey	Sample of Pastors/Churches – North America
Church Survey	
SPRC Survey	

## Survey administration

- Email invitations were sent on May 11, 2010
  - Bishop invitation came from the Council of Bishops office
  - District Superintendent, Pastor, Church, SPRC invitations came directly from Towers Watson
- Reminder emails were sent to boost participation
- Survey was open for two and a half weeks to ensure that everyone had the opportunity to participate
- Good response rate across four of the five surveys

## Survey response rates

Survey (All North America)	# Invited	# Responding	Response Rate
Bishop Survey	62	33	53%
District Superintendent Survey	458	164	36%
Pastor Survey	17,943	3,392	19%
Church Survey	17,943	2,208	12%
SPRC Survey	3,506	54	2%



**Survey Representativeness**



# Testing for representativeness

Survey (All North America)	Response Rate	Comment
Bishop Survey	53%	TW tied Pastor and Church data to conferences where the Bishop responded
District Superintendent Survey	36%	Based on TW analyses, the respondents to this survey are representative of the population
Pastor Survey	19%	Based on TW analyses, the respondents to this survey are representative of the population
Church Survey	12%	Based on TW analyses, the respondents to this survey are representative of the population
SPRC Survey	2%	Response rate was too low to use these survey responses in our analyses

## Why these findings can be trusted

- In a research study like this, we look at two factors
  - Representative – do the findings apply across all of the population? **YES**
  - Reliability – would the findings be replicated if we did the study again? **YES**

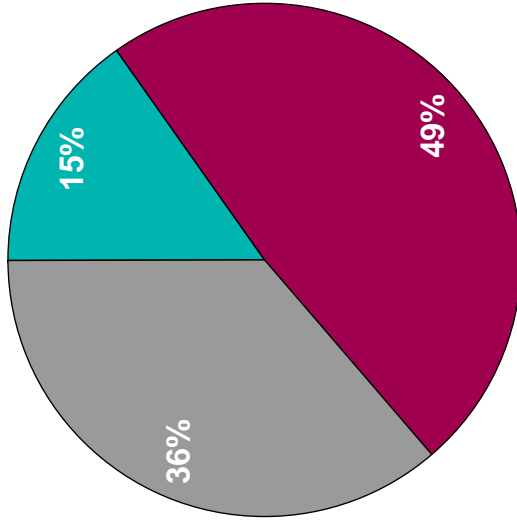
***The findings apply across the whole North American UMC population and would be replicated if the study were done again.***

Representative (North America)	<ul style="list-style-type: none"> <li>• Each of the conferences are represented</li> <li>• Churches of all sizes are represented</li> <li>• Churches of all levels of vitality are represented</li> <li>• Churches from ethnic minorities (Asian, Black, Hispanic) are represented</li> </ul>
Reliability	<ul style="list-style-type: none"> <li>• Based on the number of responses, we can be 95% confidence in the results with a margin of error of +/- 2 percentage points</li> </ul>

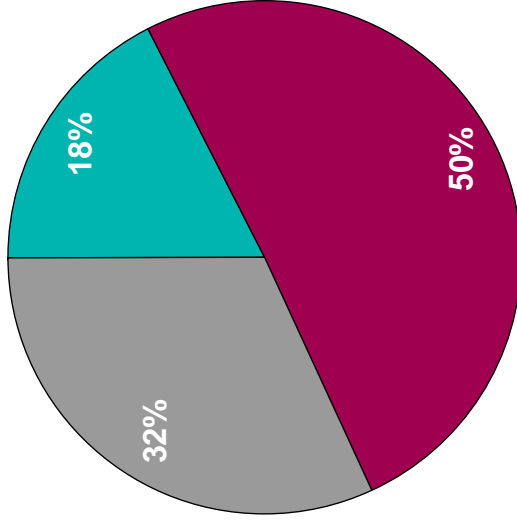
# Analysis: Vitality index Total church population vs. sample vs. respondents

**Conclusion:** Respondent population is representative of both Sample and Total Population for North America

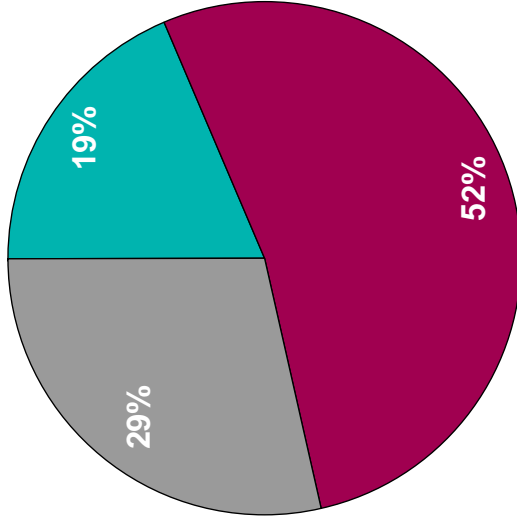
**Total Church Population**



**Sample Church Population**



**Respondent Population**



■ High Vitality   ■ Medium Vitality   ■ Low Vitality





**Data Analysis**

# Indicators of vitality based on Steering Team input

## 1. Average worship attendance as percentage of membership

- 1.a. Single point and over five years
- 1.b. Increase or decrease over five years

## 2. Total membership

- 2.a. Single point and over five years
- 2.b. Increase or decrease over five years

## 3. Number of children, youth, and young adults attending as a percentage of membership

- 3.a. Single point and over five years
- 3.b. Increase or decrease over five years

## 4. Number of professions of faith as percentage of (a) attendance and (b) membership

- 4.a. Single point and over five years
- 4.b. Increase or decrease over five years

## 5. Annual giving per attendee

- 5.a. Single point and over three years
- 5.b. Increase or decrease over three years

## 6. Financial benevolence beyond the local church as a percentage of church budget

- 6.a. Single point and over five years
- 6.b. Increase or decrease over five years

**NOTE:** The indicators of vitality were chosen as proxies for vitality by the steering team as the indicators needed to be measurable and have available data

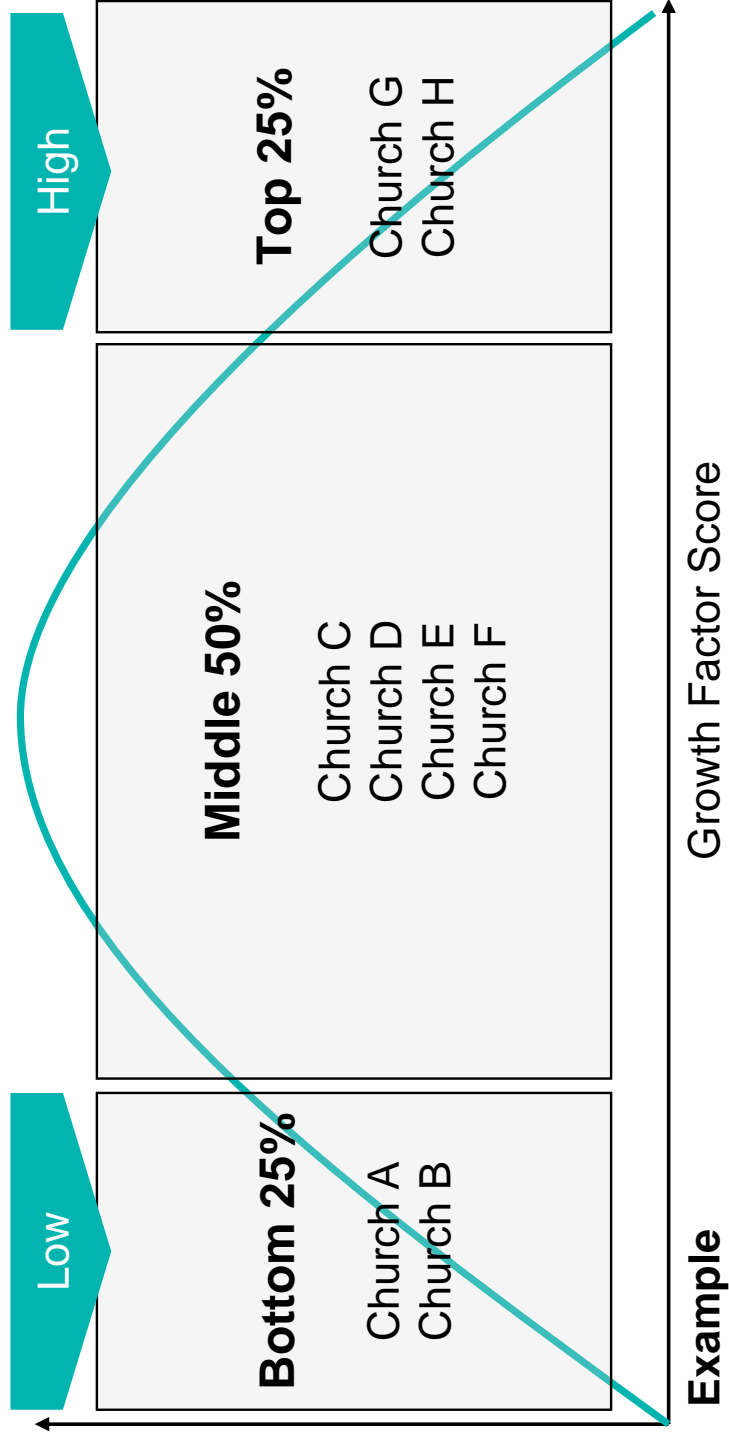
## Vitality index

- Towers Watson used a statistical technique called factor analysis to group the Indicators of Vitality into three factors as shown below

Factor	Indicators of Vitality
<b>Attendance</b>	<ul style="list-style-type: none"> <li>• Average worship attendance as percentage of membership</li> <li>• Number of children, youth, and young adults attending as a percentage of membership</li> </ul>
<b>Growth</b>	<ul style="list-style-type: none"> <li>• Change in average worship attendance as percentage of membership over five years</li> <li>• Change in membership over five years</li> <li>• Change in annual giving per attendee over three years</li> <li>• Change in financial benevolence beyond the local church as a percentage of church budget over five years</li> </ul>
<b>Engagement</b>	<ul style="list-style-type: none"> <li>• Professions of faith per member</li> <li>• Annual giving per attendee</li> </ul>

## Vitality index (continued)

- A score was calculated for each church in North America where data were available (n= 32,228) for each of the three factors
- Churches were segmented into three groups based on the distribution of their scores



## Vitality Index (continued)

- A numeric score (either 1, 2, or 3) was assigned to each of the factors for each church depending on whether they were in the Top, Middle, or Bottom segment of the distribution

Factor	Indicators of Vitality	Top 25%	Middle 50%	Bottom 25%
<b>Attendance</b>	<ul style="list-style-type: none"> <li>• Average worship attendance as percentage of membership</li> <li>• Number of children, youth, and young adults attending as a percentage of membership</li> </ul>	3	2	1
<b>Growth</b>	<ul style="list-style-type: none"> <li>• Change in average worship attendance as percentage of membership over five years</li> <li>• Change in membership over five years</li> <li>• Change in annual giving per attendee over three years</li> <li>• Change in financial benevolence beyond the local church as a percentage of church budget over five years</li> </ul>	3	2	1
<b>Engagement</b>	<ul style="list-style-type: none"> <li>• Professions of faith per member</li> <li>• Annual giving per attendee</li> </ul>	3	2	1

## Vitality Index (continued)

- A single index was calculated for each church by adding up the numeric scores on each of the three factors

Church	Attendance	Growth	Engagement	Vitality Index
A	3	3	3	<b>9</b>
B	3	2	1	<b>6</b>
C	2	2	2	<b>6</b>
D	1	1	1	<b>3</b>

## Vitality Index (continued)

- To facilitate the analysis, the vitality index was collapsed into three categories: High Vitality, Medium Vitality, and Low Vitality

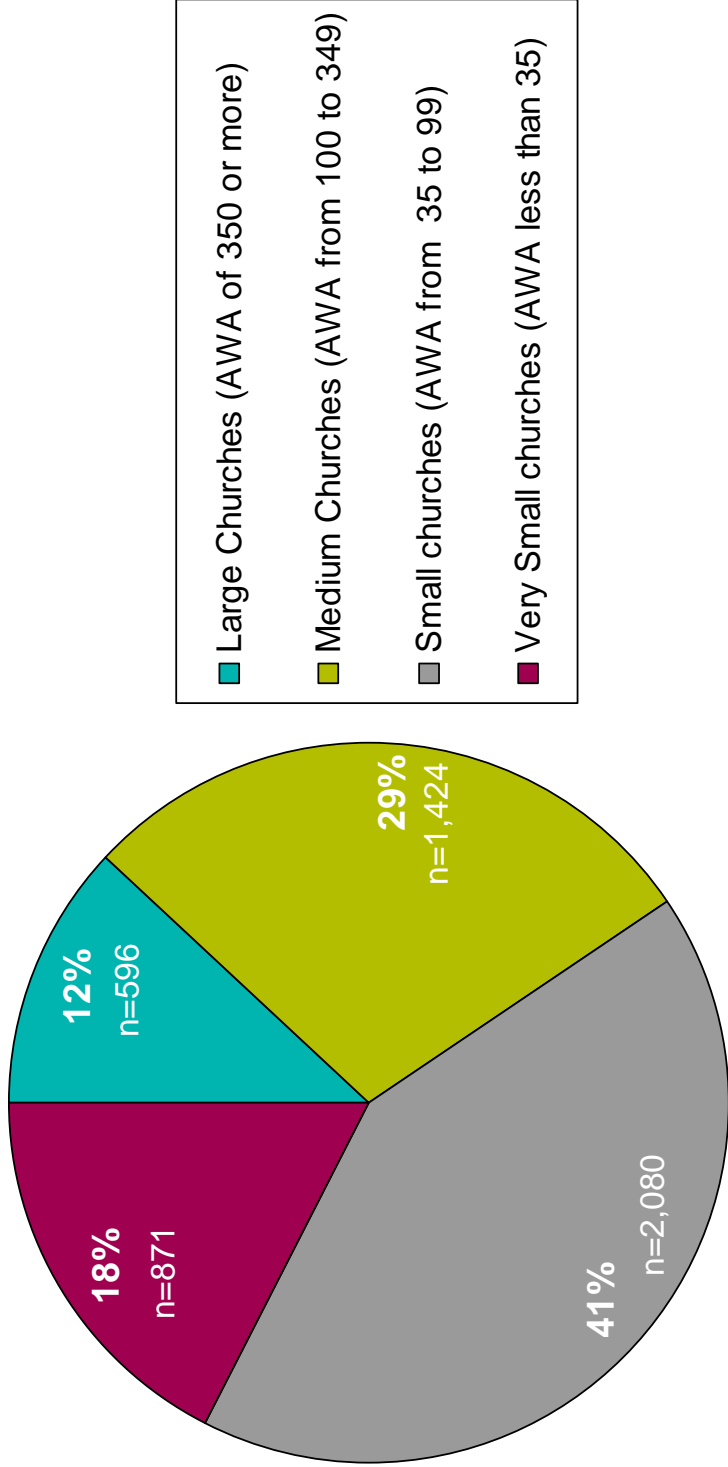
Vitality Index	Category	% of Total* UMC NA Churches	# of UMC NA Churches
9	High Vital	15%	4,961
8			
7	Medium Vital	49%	15,546
6			
5	Low Vital	36%	11,721
4			
3			

\*Based on the 32,228 churches with available data on the Indicators of Vitality

## Vitality index by church size

- While larger churches are more likely to be vital than smaller churches there are many high vital churches across all church sizes

Percent of Total Vital Churches by Church Size





## Calculating the key drivers of vitality

- Statistical technique used to identify the impact of variables on a desired outcome
  - **Direction** - Does this variable have a positive or negative impact on the desired outcome?
  - **Magnitude** – How much impact does this variable have on the desired outcome?
- Commonly used statistical technique in consumer, employee and political research to help identify and prioritize actions that will have the greatest impact on a desired outcome

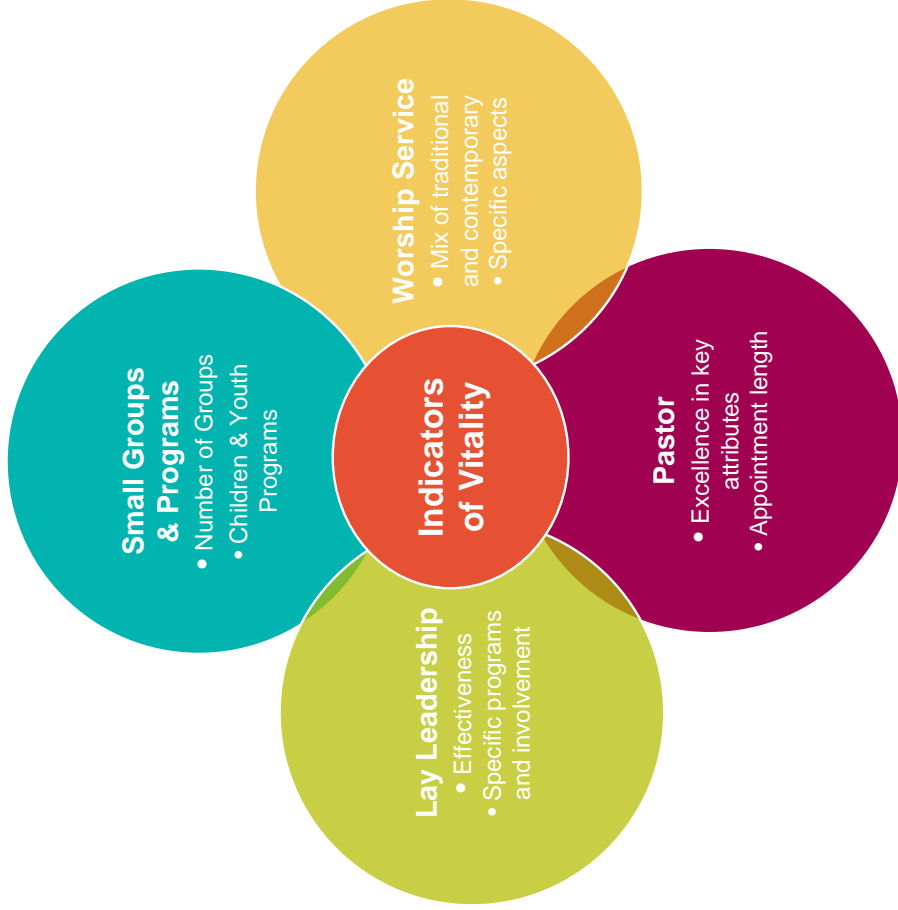
## Calculating the key drivers of vitality (continued)

- Regression analysis quantified the relationship between the variables in each hypotheses and the Indicators of Vitality
  - Some factors had a positive impact
  - Some factors had a negative impact
  - Some factors had no significant impact
- Regressions showed also that the variables in each hypothesis impacted the factors of vitality (Attendance, Growth, Engagement) in different ways
  - Throughout the findings, we will highlight when the hypotheses had an impact on the Vitality Index and when the hypotheses had an impact on specific factors of vitality



**Findings**

# Four key areas are the drivers of vitality



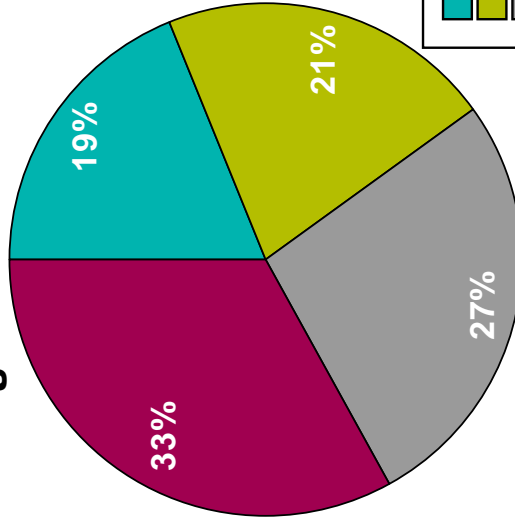
- Towers Watson calculated a vitality index for each church (n=32,228) based on indicators of vitality identified by the Steering Committee
- Based on vitality index, Towers Watson found that all kinds of UMC churches are vital – small, large, across different geographies, and church setting (e.g., urban, rural)
- Towers Watson conducted regression analyses to identify drivers of the vitality index and four key drivers of vitality stand out – crystal clear findings that are actionable
- The four key drivers of vitality are fairly consistent across different types of churches

**Note:** Small groups include study, fellowship, and service. Programs include classes and other activities

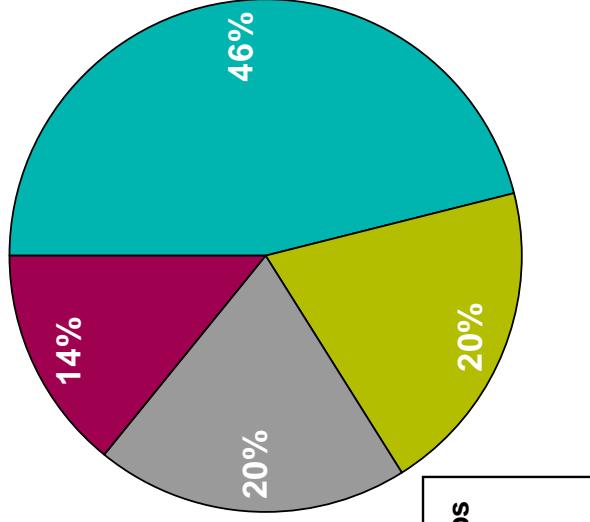
## Small groups & programs Number of small groups – all churches

- Regressions identified that the number of small groups (study, fellowship, service) impacts vitality

### High Vital Churches



### Low Vital Churches



- 60% of churches with high vitality have over 5 small groups
- Only 1/3 of churches with low vitality have over 5 small groups

**Note:** Small groups include study, fellowship, and service

## Small groups & programs Number of small groups – by church size

- Regardless of size, more vital churches have more small groups

	# of Groups in a High Vital Church	# of Groups in a Low Vital Church	% Difference
Larger Churches (AWA of 350 or more)	37.5	22.5	66%
Medium Size Churches (AWA between 100 and 349)	12.1	9.8	23%
Small churches (AWA between 35 and 99)	5.1	4.5	12%
Very Small churches (AWA less than 35)	2.9	2.5	16%

**Note:** Small groups include study, fellowship, and service  
[towerswatson.com](http://towerswatson.com)

## Small groups & programs Number of programs for children

- Regardless of size, more vital churches have more programs for children (under 12 years old)

	# of Programs in a High Vital Church	# of Programs in a Low Vital Church	% Difference
Larger Churches (AWA of 350 or more)	16.9	6.8	149%
Medium Size Churches (AWA between 100 and 349)	6.7	4.7	42%
Small churches (AWA between 35 and 99)	3.4	2.5	34%
Very Small churches (AWA less than 35)	2.2	1.4	59%

**Note:** Programs include classes and other activities  
[towerswatson.com](http://towerswatson.com)

## Small groups & programs Number of programs for youth

- Regardless of size, more vital churches have more programs for youth (age 12 -18)

	# of Programs in a High Vital Church	# of Programs in a Low Vital Church	% Difference
Larger Churches (AWA of 350 or more)	8.7	4.7	83%
Medium Size Churches (AWA between 100 and 349)	3.5	2.4	45%
Small churches (AWA between 35 and 99)	1.8	1.2	43%
Very Small churches (AWA less than 35)	1.3	0.7	75%

**Note:** Programs include classes and other activities  
[towerswatson.com](http://towerswatson.com)



## Small groups

- Several factors around programs (classes and groups) did NOT have a significant impact on vitality
  - Percent of eligible attendees who participate
  - Who has primary responsibility for leading programs
  - Mix of local vs. global mission outreach programs
  - Number of programs for young adults and adults

## Lay leadership Effectiveness of lay leadership

- Effectiveness of lay leadership has a strong impact on vitality

### Churches with effective lay leadership are:

- 84% more likely to be a high vital church
- 48% more likely to be high attendance church
- 54% more likely to be a high growth church
- 30% more likely to be a high engagement church

### What drives laity Effectiveness?

- Demonstrate vital personal faith
- Rotate
- More attendees serving as lay leaders

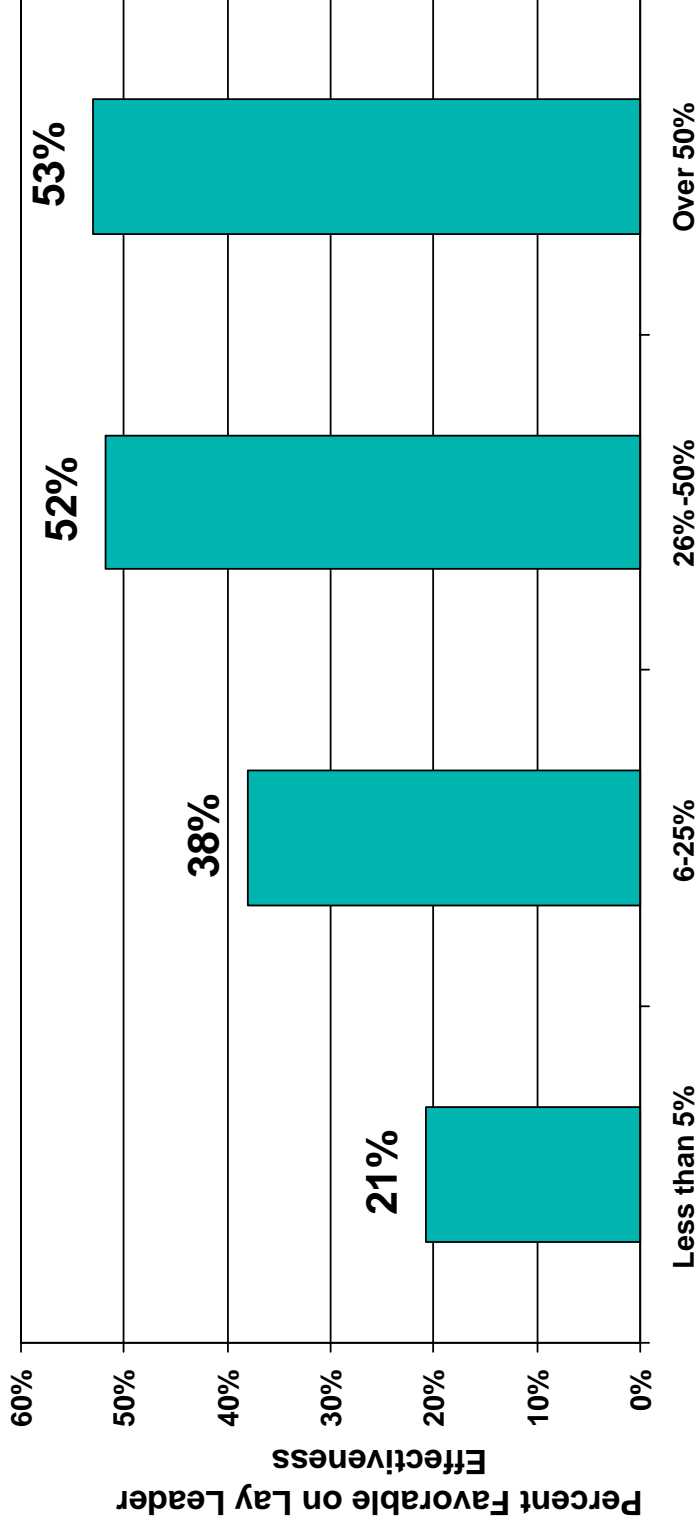
## Lay leadership Building effective *lay leadership*

- Highly effective lay leadership is strongly associated with those who demonstrate vital personal faith

	Highly Effective Lay Leadership	Ineffective Lay Leadership
Lay leadership team demonstrate vital personal faith (e.g., regular disciplines of prayer and Bible Study, regular attendance at weekly worship, proportional giving, participation in mission opportunities, personal faith-sharing)	<b>61%</b>	<b>12%</b>
Rotate lay leadership	<b>77%</b>	<b>66%</b>

## Lay leadership Building effective lay leadership

- Need to reach critical mass equal to 25 – 50% of attendees who have served as leaders to create effective lay leaders and drive vitality



Percent of attendees that have served as leaders in past five years

## Lay leadership Building effective lay leadership

- Pastors who were rated as effective at developing, coaching and mentoring lay leaders are more likely to have high vital churches

Leadership Attribute	Churches with High Vitality	Churches with Low Vitality
Focusing on developing, coaching and mentoring to enable laity leadership to improve performance	70%	47%

**Note:** Numbers shown represent the % of churches that are high vital when the pastor was rated effective

## Worship service Mix of contemporary and traditional

- High vital churches tend to provide a mix of both traditional and contemporary services

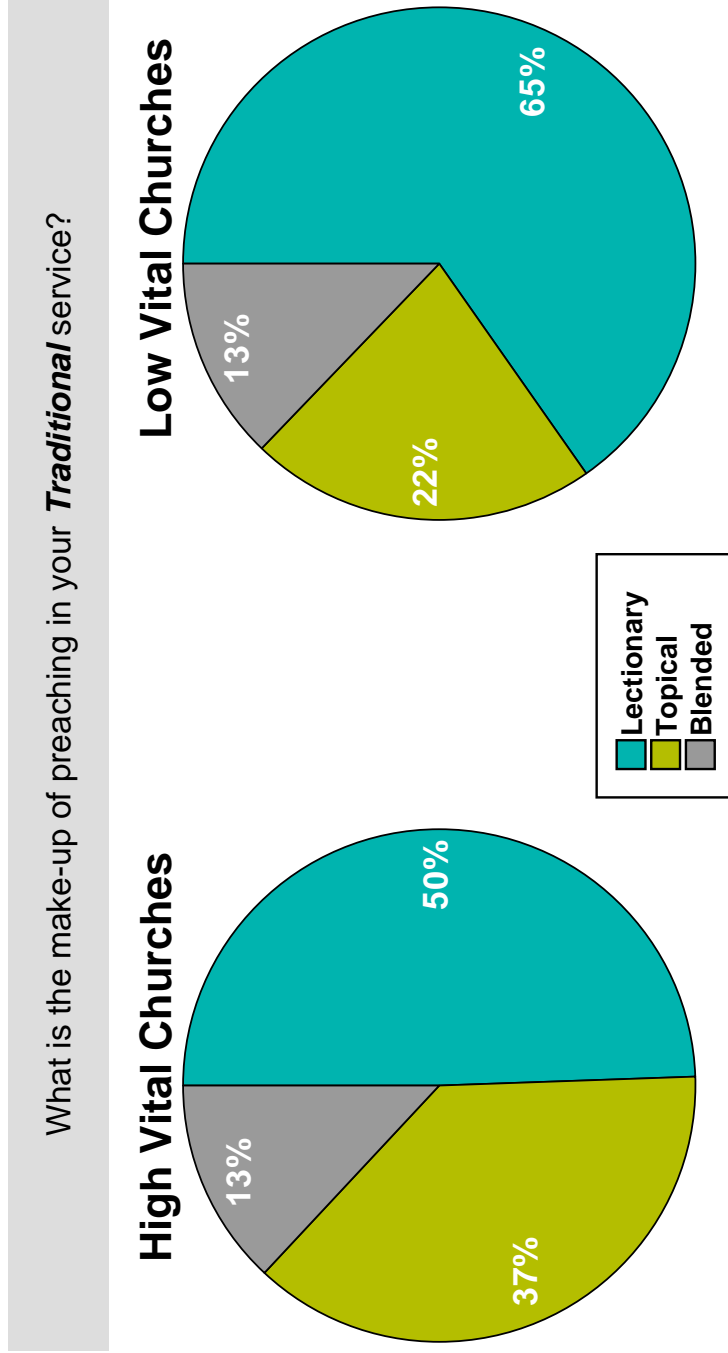
	% of Churches that are High Vitality	% of Churches that are Low Vitality
Traditional Service <b>ONLY</b>	31%	55%
Contemporary Service <b>ONLY</b>	21%	15%
Traditional <b>AND</b> Contemporary Services	<b>43%</b>	<b>24%</b>
Neither Contemporary <b>NOR</b> Traditional Services	6%	6%

# Worship service Mix of contemporary and traditional by church size

	% of Churches that are High Vitality	% of Churches that are Low Vitality
Larger Churches with Traditional <b>AND</b> Contemporary Services (AWA of 350 or more)	42% (n=86)	4% (n=8)
Medium Size Churches with Traditional <b>AND</b> Contemporary Services (AWA between 100 and 349)	22% (n=125)	21% (n=121)
Small churches with Traditional <b>AND</b> Contemporary Services (AWA between 35 and 99)	19% (n=45)	29% (n=70)
Very Small churches with Traditional <b>AND</b> Contemporary Services (AWA less than 35)	16% (n=8)	53% (n=27)

## Traditional worship service Basis for preaching

- Preaching in **traditional** worship services at high vital churches tends to be more topical and less based on the lectionary than in churches with relatively low vitality





## Worship service Inspirational Preaching

- Pastors who were rated as effective at inspiring the congregation are more likely to have high vital churches

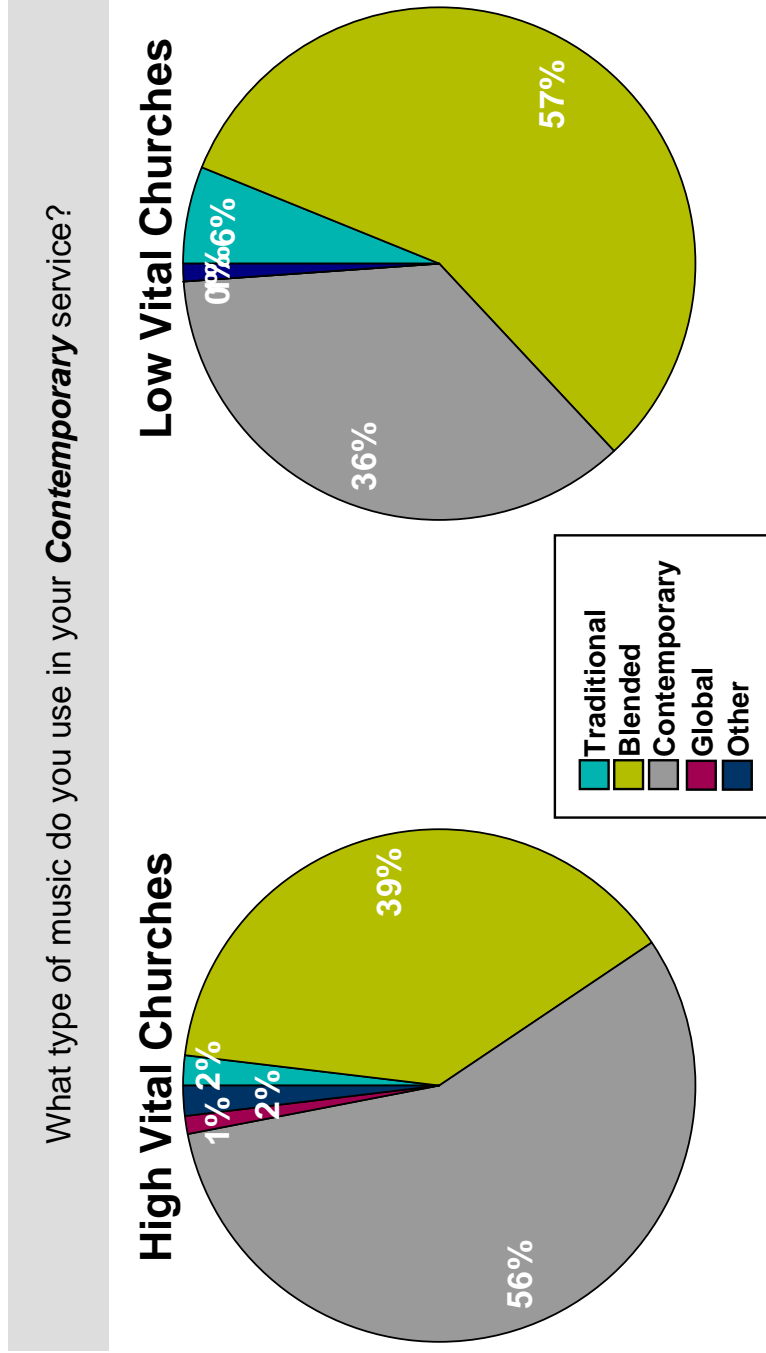
Leadership Attribute	Churches with High Vitality	Churches with Low Vitality
Inspiring the congregation through preaching	81%	65%

**Note:** Numbers shown represent the % of churches that are high vital when the pastor was rated effective

# Contemporary worship service

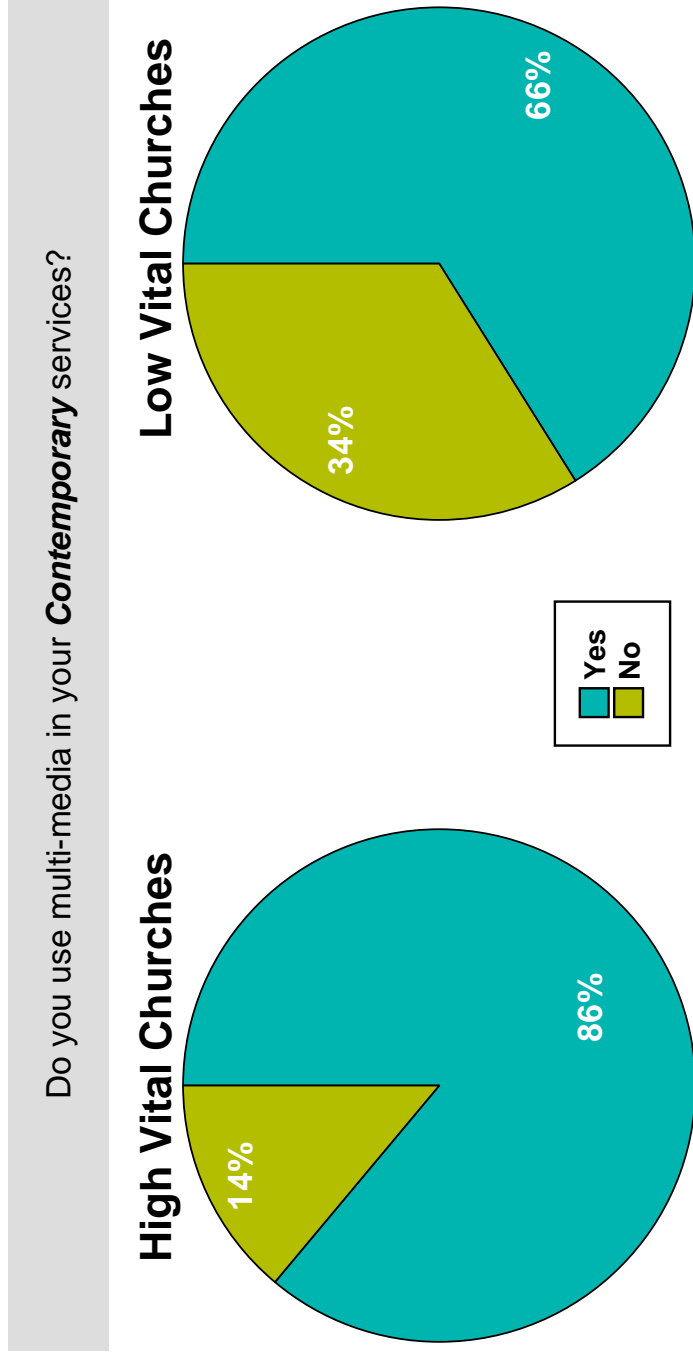
## Type of worship music

- High vital churches are more likely to use contemporary music in their contemporary services



# Contemporary worship service Use of multi-media

- High vital churches are more likely to use multi-media in their contemporary services



## **Worship service**

- Several factors around the worship service did NOT have a significant impact on vitality
  - Use of experiential activities (e.g., prayer station, art, straw polls) during the service
  - Length of sermon
  - Make-up of preaching in Contemporary worship services
  - Type of music and use of multimedia in Traditional worship services

## **Pastor** **Leadership effectiveness**

- Over 1,200 Pastors, from all church sizes across North America, were assessed on 14 leadership attributes
  - Working in partnership with others (e.g., lay leaders, congregation) to accomplish goals
  - Recognizing, addressing, and managing discord in a fair and positive manner
  - Encouraging and empowering others to take ownership
  - Focusing on developing, coaching and mentoring to enable Laity leadership to improve performance
  - Inspiring passion and enthusiasm in others for spiritual development, discipleship, and outreach
  - Developing personal knowledge, skills, and abilities to continuously improve and grow oneself
  - Defining and articulates a future vision for the local church
  - Inspiring confidence and trust through words and deeds
  - Demonstrating effective management of the local church (e.g., financial, operational, staff)
  - Influencing the actions and behaviors of others to accomplish changes in the local church
  - Recognizing, understanding, and empathizing with the feelings and needs of others and responds accordingly
  - Propelling the local church to set and achieve significant goals through effective leadership
  - Understanding and leading in the context in which they serve
  - Inspiring the congregation through preaching

## Pastor Leadership effectiveness (continued)

- Four of the leadership attributes have a stronger impact on vitality than the others


Leadership Attribute	Churches with High Vitality	Churches with Low Vitality
Focusing on developing, coaching and mentoring to enable laity leadership to improve performance	70%	47%
Influencing the actions and behaviors of others to accomplish changes in the local church	79%	53%
Propelling the local church to set and achieve significant goals through effective leadership	76%	51%
Inspiring the congregation through preaching	81%	65%

**Note:** Numbers shown represent the % of churches that are high vital when the pastor was rated effective

## Pastor Leadership effectiveness (continued)

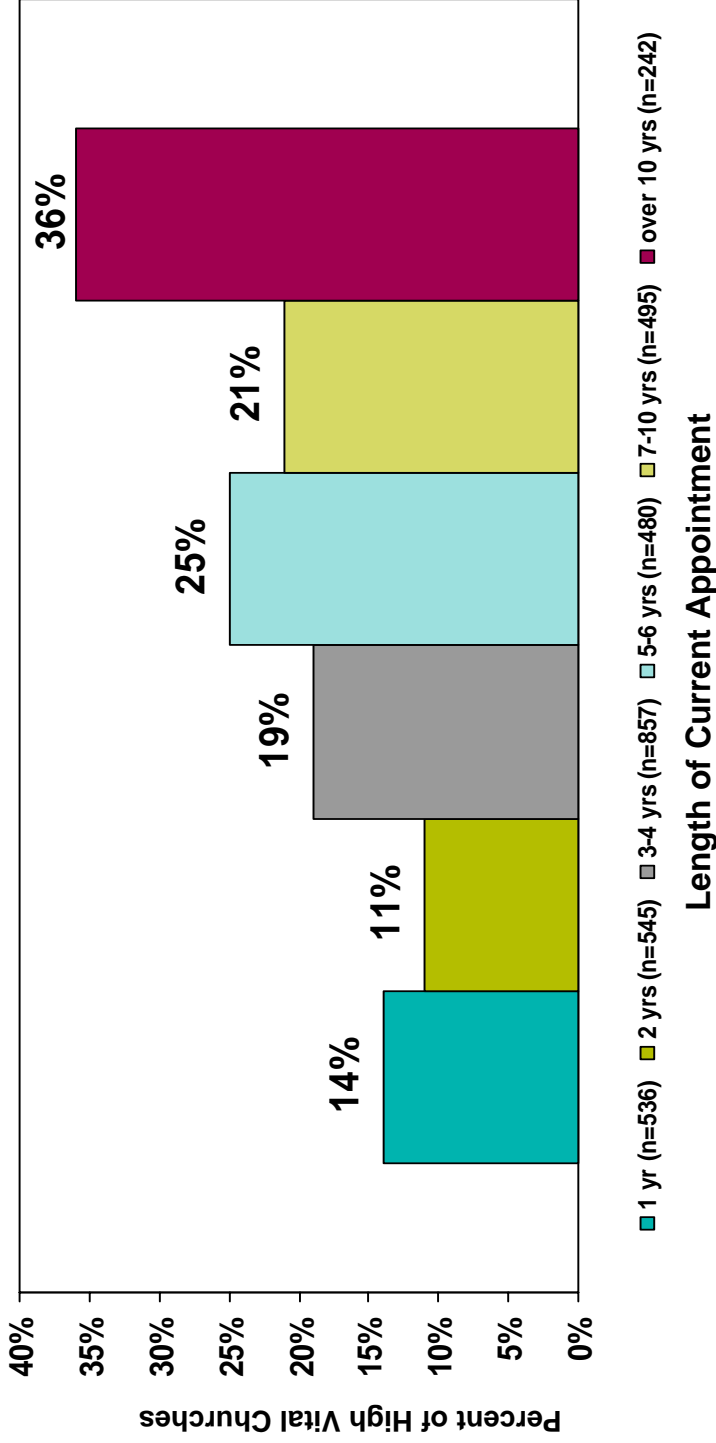
- The four key leadership attributes have stronger impact on some of the factors of vitality than others

Leadership Attribute	Attendance Factor	Growth Factor	Engagement Factor
Focusing on developing, coaching and mentoring to enable laity leadership to improve performance			
Influencing the actions and behaviors of others to accomplish changes in the local church			
Propelling the local church to set and achieve significant goals through effective leadership			
Inspiring the congregation through preaching			

 Denotes the variable has a positive impact on the factor of vitality

## Pastor Length of appointment

- Contribution of the Pastor to vitality is evident after three years

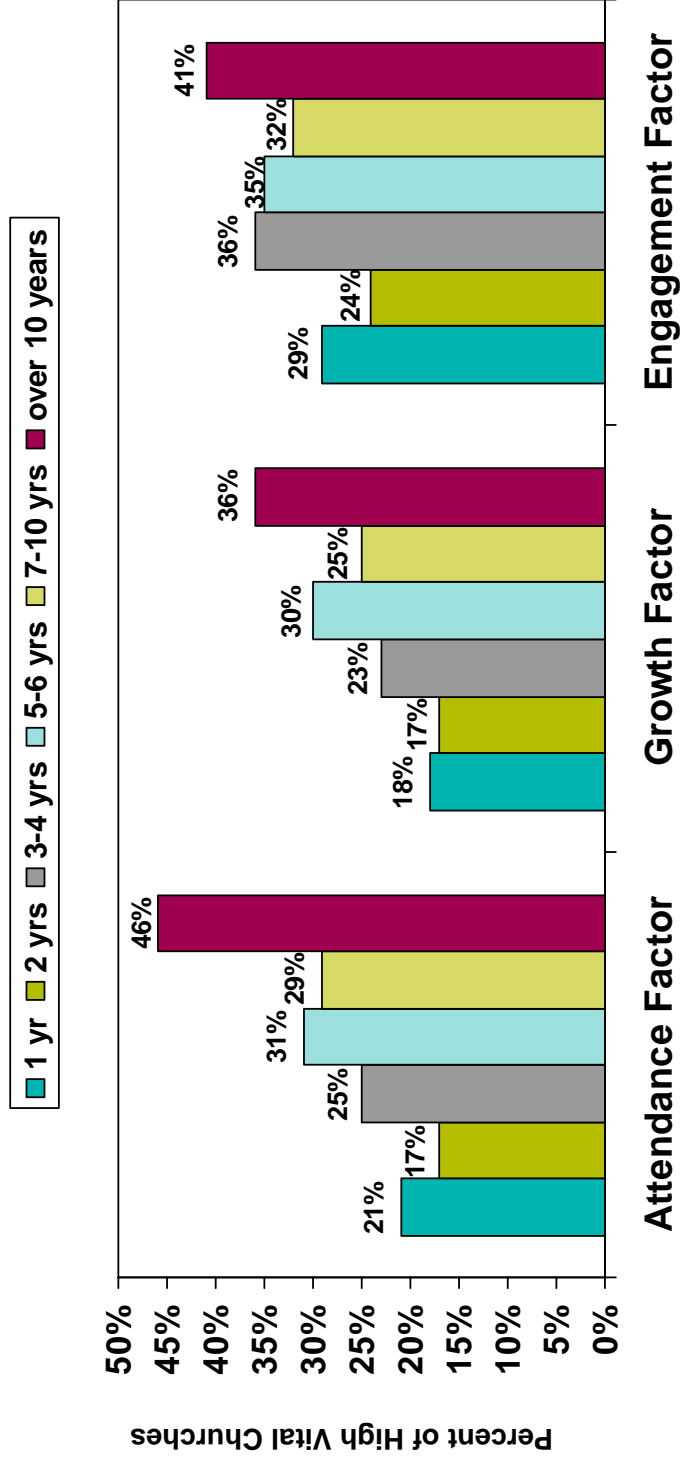


**NOTE:** Patterns and findings are consistent when Pastors who had several short-term appointments are included or removed from analysis



## Pastor Length of appointment (continued)

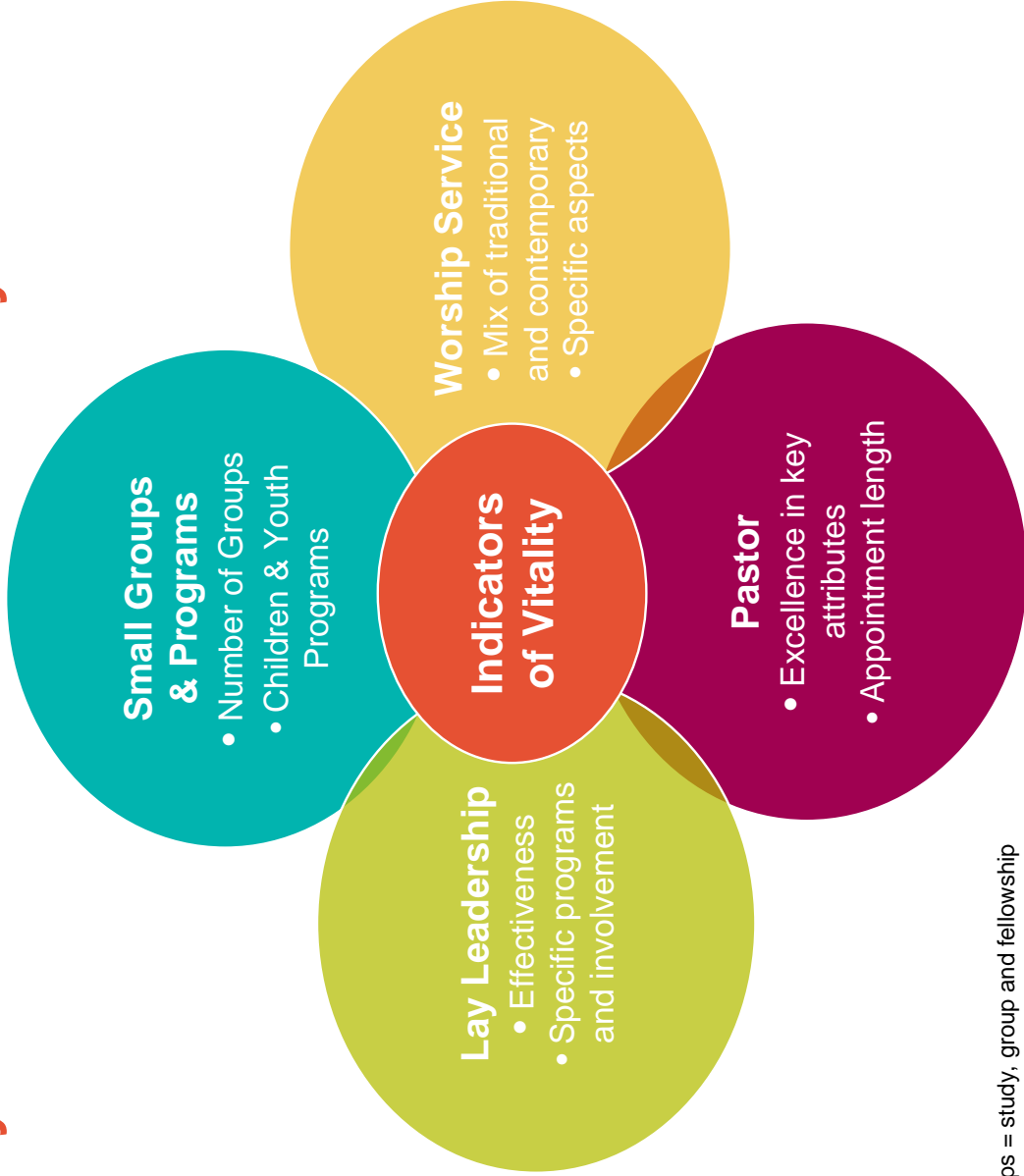
- Pastor contribution to vitality builds quickly for the engagement part of vitality compared to the other two sub-factors.



## Pastor

- Several factors around the Pastor did NOT have a significant impact on vitality
  - Graduating from seminary or not
  - Years engaged in pastoral ministry
  - Whether pastoral ministry is first or second career

# Four key areas are the drivers of vitality



Note: Small groups = study, group and fellowship

# Driving different factors of vitality

Driver	Overall Vitality	Attendance Factor	Growth Factor	Engagement Factor
<b>Small Groups</b>				
Number of small groups				
Number of programs for children				
Number of programs for youth				
<b>Lay Leadership</b>				
Effectiveness of lay leadership				
Lay leadership demonstrating vital personal faith				
Rotating lay leadership				
% of attendees serving as leaders in past 5 years				
<b>Worship Service</b>				
Mix of Traditional and Contemporary service				
Using more topical preaching in Traditional service				
Using more contemporary music in Contemporary service				
Using more multi-media in Contemporary service				
<b>Pastor</b>				
Focusing on developing, coaching and mentoring to enable lay leadership to improve performance				
Influencing the actions and behaviors of others to accomplish changes in the local church				
Propelling the local church to set and achieve significant goals through effective leadership				
Inspiring the congregation through preaching				
Length of appointment				

Denotes the driver has a positive impact on the factor of vitality

**Note:** Small groups include study, fellowship, and service

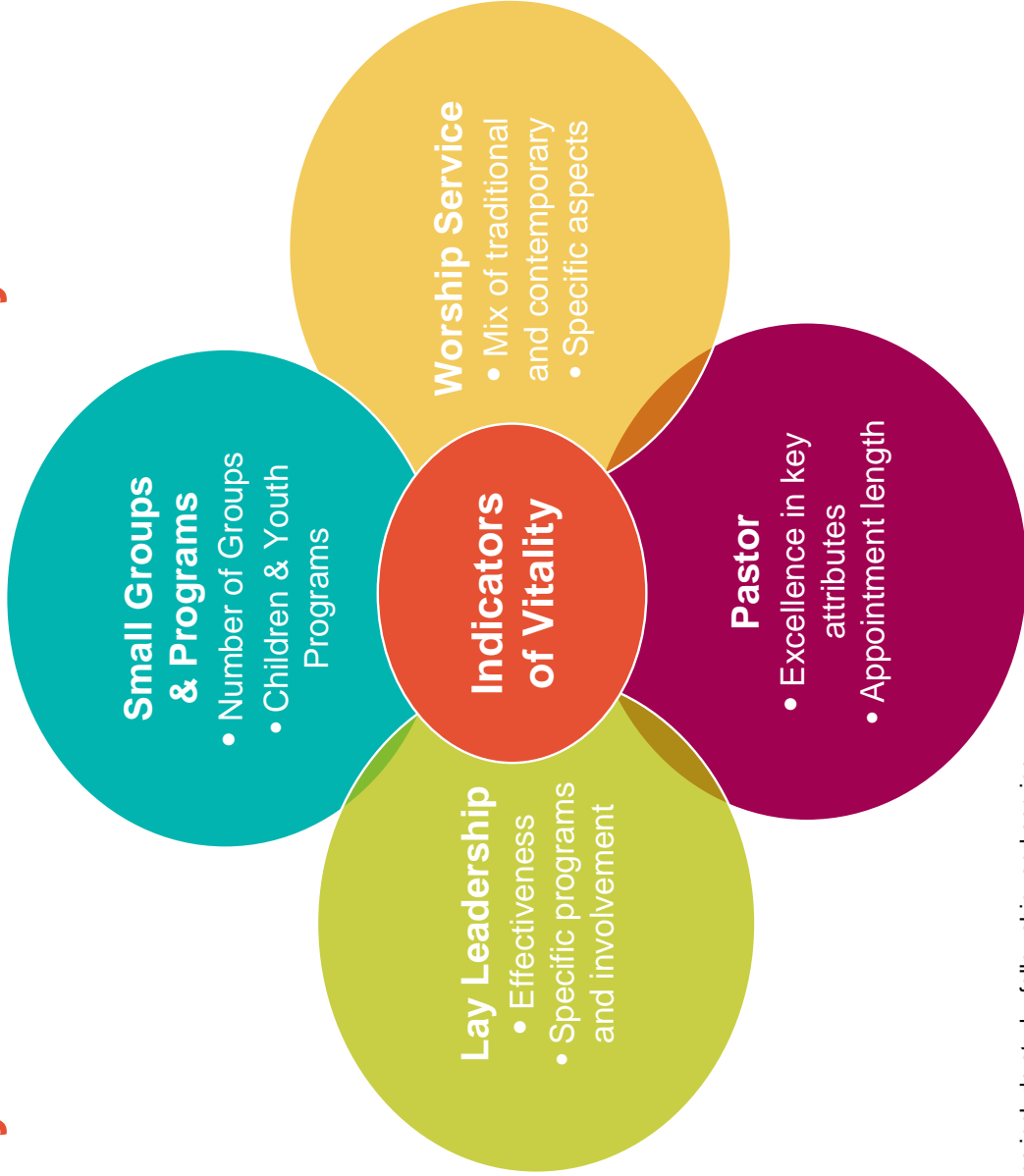
## Driving vitality in different types of churches

The four key drivers of the indicators of vitality (small groups, lay leadership, worship service, and the pastor) are consistent regardless of church size, predominant ethnicity, and jurisdiction

In addition to the four key drivers of the indicators of vitality, some nuances by church size and jurisdiction include

- Nuances by size of church include:
  - For large churches (AWA of 350 or more), being representative of the community around them and having pastors who spend more time on preaching, planning and leading worship has a strong relationship with vitality
- Nuances by jurisdiction include:
  - In the South Central and South Eastern jurisdictions, the length of tenure of the clergy as pastors has a strong relationship with vitality
  - In the North Eastern jurisdiction, pastors spending more time on personal devotion and worship has a strong relationship with vitality
  - In the Western jurisdiction, churches that are representative of the community around them and have a pastor that leads in the context of the community have a higher association with vitality
- No variations by predominant ethnicity

# Four key areas are the drivers of vitality



**Note:** Small groups include study, fellowship, and service

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## Appendix 2

# **Towers Watson** Additional Analysis

2



## Additional Analysis

**Q:** How do we know that theological orientation of the congregation, theological orientation of the Pastor, predominant ethnicity of the congregation, and jurisdiction don't have an impact on church vitality?

**A:** To identify whether or not a specific factor such as theological orientation or geography (shown through jurisdiction) has an impact on vitality, we used a regression analysis to estimate the impact of these factors. This approach allows us to isolate the impact of each factor individually while controlling for the impact of other factors. In the regression analysis, none of these factors had a statistically significant impact on church vitality. This finding is very consistent with what we saw when we examined the distribution of those factors between churches with high vitality vs. churches with low vitality.

Figure 1: Distribution Across Churches with High Vitality vs. Low Vitality

Theological orientation of your current congregation (pastor perception)	% of High Vitality Churches	% of Low Vitality Churches
Very Liberal	1	1
Somewhat Liberal	6	7
Partially Liberal/ Conservative	32	37
Somewhat Conservative	43	34
Very Conservative	19	21

Theological orientation of Pastor (self-reported)	% of High Vitality Churches	% of Low Vitality Churches
Very Liberal	9	9
Somewhat Liberal	26	18
Partially Liberal/ Conservative	30	30
Somewhat Conservative	25	28
Very Conservative	9	14

Ethnic Group	% of High Vitality Churches	% of Low Vitality Churches	% of UMCs in North America
Asian	0.3	1.3	1.1
Black	5.6	5.9	6.9
Hispanic	0.1	0.8	0.9
White	94.0	92.1	90.2

Jurisdiction	% of High Vitality Churches	% of Low Vitality Churches	% of UMCs in North America
North Central	22	20	21
Northeastern	12	12	21
South Central	20	18	17
Southeastern	41	45	35
Western	5	4	5

Distributions based on survey responses to UMC's CTA 2010 Research

From the data shown above in Figure 1, you can see how the distribution or percentages of each of the groups are very similar regardless of whether the churches are vital or not. From this, we

can conclude that theological orientation of the congregation, theological orientation of the Pastor, predominant ethnicity of the congregation, and jurisdiction do not have a strong correlation on whether or not a church is vital. Both of these analyses support our conclusion that these factors are not drivers of church vitality.

Q: How is it that “lay leadership demonstrating vital personal faith” and “% of attendees serving as leaders in past 5 years” can be drivers of overall vitality but don’t drive any of the factors of engagement (attendance, growth, or engagement)?

A: The drivers of overall vitality were shown to have a strong statistical relationship with overall vitality as defined by combination of all the indicators of vitality outlined by the CTA steering team. Each of those drivers were then also looked at to determine whether or not they had a strong statistical relationship with any of the individual factors of vitality (attendance, growth, engagement). While “lay leadership demonstrating vital personal faith” and “% of attendees serving as leaders in past 5 years” are not strong drivers of specific aspects of vitality individually, they can be expected to help enough across each of the three aspects that their *aggregate impact* on *overall vitality* is significant.

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## Appendix 3

# **Towers Watson** Project Overview

Call to Action  
Vital Congregations Research Project  
Overview

3

## Call to Action Vital Congregations Research Project Overview

The Call to Action Steering Team has engaged Towers Watson, a leading global professional services organization, to help gather objective data on what works and does not work in churches and to create a platform of common understanding of relative factors.

### Research Model

There are many widely-recognized expressions of church vitality. This research project will not attempt to define church vitality per se, but instead mine data in order to identify the specific, measurable factors that promote vitality. The research will focus on the identification of:

- Outcome Measures—how do we recognize church vitality when we see it?
- Drivers of Vitality—what factors specifically promote vitality and enable it to flourish?

### Research Tools

The research process will use two proven, widely used research tools: data mining and regression analysis.

Data mining is the process of collecting and statistically analyzing very large amounts of quantifiable data to uncover and clarify complex relationships. Data mining is widely used in all types of research because it is objective—only quantifiable data is used to test relationships.

Regression analysis is a statistical technique used to identify the impact of multiple factors on a specific desired outcome. Regression analysis shows both the direction and magnitude of any identified relationships.

### Research Methodology

The research methodology involves two simple steps:

**Step 1: Develop Hypotheses**  
What potentially impacts vitality?

Goal is to develop hypotheses based on the perceptions of a selected, broad sample

**Step 2: Test Hypotheses**  
What statistically impacts vitality?

Goal is to identify the factors that have the greatest impact on local church vitality for steering team consideration

In Phase 1 performed in February and March 2010, Towers Watson engaged in input and discovery. We conducted a number of interviews, surveys, church visits, and observations and worked with the Steering Team to develop several **hypotheses** that could potentially impact church vitality. We interviewed over two dozen Bishops, pastors, lay leaders, and Agency leaders, collected several hundred survey responses, and captured additional qualitative input from Conference Appointment Meetings and other meetings. We drew upon a variety of perspectives from across the organization so that the resulting hypotheses fully reflected the range of factors that possibly impact vitality. We collected sufficient information to identify common thematic areas of focus and draft specific hypotheses for vetting by the project Steering Team prior to being finalized.

Towers Watson working with the Steering Team used the information gathered to identify specific **Outcome Measures** that reflect church vitality. While many individuals across the Church indicate that they “know church vitality when they see it,” the purpose of establishing quantitative Outcome Measures is to introduce objectivity to the understanding of what drives vitality. While the Outcome Measures do not reflect all of the many expressions of vitality, they address certain quantitative aspects where data is readily available, reliable, and valid.

In Phase 2, to be performed in April and May 2010, Towers Watson will discern what the meaning of the results in Phase 1. Each hypothesis will be tested to identify relationships between factors and outcomes. We will use both data mining and regression analysis to collect and analyze very large amounts of data. Much of this data has been collected and tracked for some years by the United Methodist Church and we will augment the existing data by capturing significant additional quantitative data via organization-wide surveys. We anticipate conducting targeted follow-up interviews with a spectrum of respondents to ensure that captured data is fully understood.

In the final phase, Towers Watson will prepare a findings report that details the outcomes of the statistical analysis, showing specifically which of these measurable factors drive church vitality as reflected in Outcome Measures and which do not. Recognizing that there are many expressions of church vitality, some of which are not readily measurable, the research findings will serve as only one input to decisions taken by the project Steering Team in determining the implications and significance of the drivers of church vitality.

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# Appendix 4

## **Towers Watson** Research Methodology

Call to Action  
Vital Congregations Research Project  
Overview of Research Methodology

4



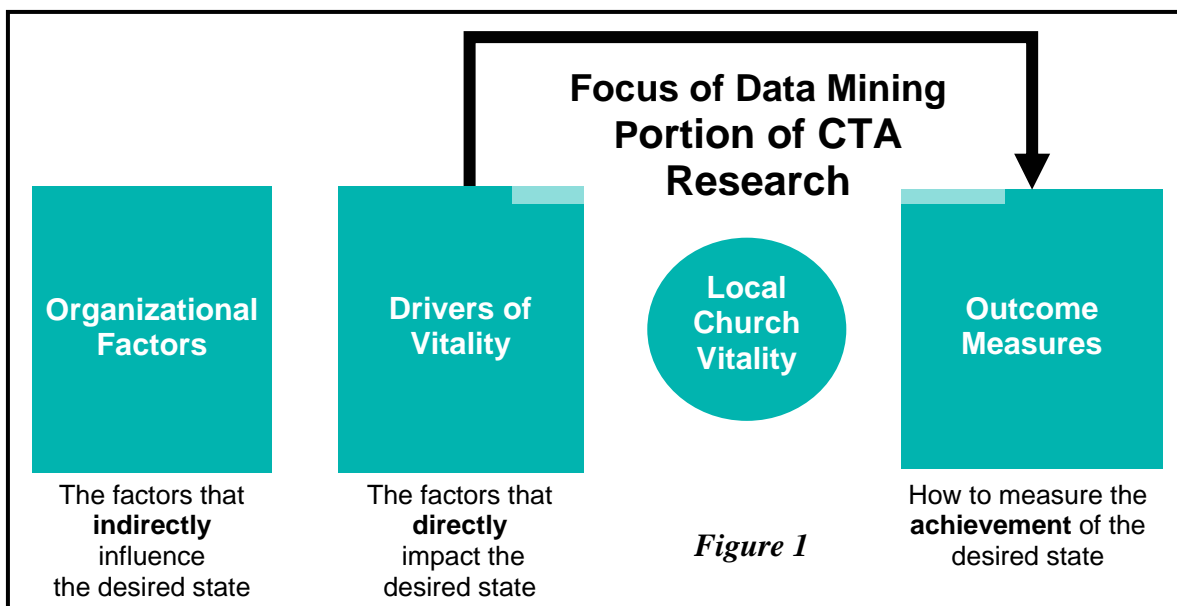
# Call to Action Vital Congregations Research Project Overview of Research Methodology

The Call to Action Steering Team (hereafter the “Steering Team”) engaged Towers Watson (hereafter “TW”), a leading global professional services organization with 14,000 associates in 34 countries, to conduct empirical research to determine factors that affect church vitality. This paper provides an overview of the research methodology.

## Research Approach

The research approach is based on the standard research methodology of data mining. Data mining is the process of collecting and statistically analyzing very large amounts of data to uncover and clarify complex relationships. Data mining is widely used in all types of research, such as public health and marketing studies, because it is objective and reliable.

When large quantities of data are available across many units of observations, such as churches, data mining can be used to identify strong existing statistical relationships between the desired state and other factors that impact that desired state. As shown in Figure 1, the Vital Congregations Research Project used data mining to identify the factors that impact an outcome measure of church vitality.



The data mining process used regression analysis, a long-established statistical technique used to identify the impact of multiple factors on a specific desired outcome. Regression analysis shows both the direction and magnitude of any identified relationships:

- Direction – does this factor have a positive or negative impact on the desired outcome? In this research, does the factor have a statistically significant positive or negative impact on congregational vitality?
- Magnitude – how much impact does this factor have on the desired outcome? In this research, is the factor of major or minimal significance in driving church vitality?

Regression analysis is commonly used in consumer, employee and political research to help identify and prioritize actions that will have the greatest impact on a desired outcome. In the Vital Congregations research project, regression analysis was used to statistically identify the significant factors that impact the desired outcome – indicators of church vitality.

## **Church Vitality**

The first step in the data mining process is to identify the desired outcomes to be measured through the research. For the CTA project the aim was to measure relative levels of congregational vitality – the extent to which a local congregation is effectively pursuing the mission of making disciples of Jesus Christ for the transformation of the world. The question was this: in addition to the informed observations and opinions of various lay, clergy and academic observers, how can we measure levels of vitality in statistically valid and reliable ways?

To do so requires defining the desired outcomes in a manner that can be tabulated using valid, reliable, and objective quantitative measures that are reasonable signs of congregational effectiveness. There are many other meaningful, though subjective ways to assess the impact of a church on the faith development of those involved and as demonstrated in vibrant witness in the community and world, but for this project we focused on the subset of indicators that are statistically verifiable.

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 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. The Steering Team

and Towers Watson used the input from an array of people across all levels of the church to identify a cluster of indicators. 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 - five years across 95% of all UMC North American churches. There were many metrics that otherwise could have been useful indications of vitality, but they are either based on information that is not collected on a consistent basis across the five jurisdictions or have not been collected over a long enough period of time to allow sufficient time to establish trends.

Applying these criteria, a cluster of seven valid indicators emerged:

- 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
- Number of professions of faith as a percentage of membership
- Annual giving per attendee
- Financial benevolence beyond the local church as a percentage of the church's budget

TW used these measures both at a single point in time and examined the trends in these measures over a multiple year period.

To some extent this constellation of indicators of vitality are proxies or stand-ins. For example, average worship attendance as a percentage of membership, or changes in financial benevolence giving beyond the local church are the consequences of vitality and show increases or decreases in how each church is performing in the work of “making disciples” and engaging disciples in transforming the world.

With the assistance of GCFA, Towers Watson was provided with a five year history on each of these indicators for over 32,000 churches in North America. For each church TW applied these measures both at a single point in

time and over a multiple year period, developing a vitality distribution table of nearly all churches in the five jurisdictions. To assure confidentiality and avoid seeming to grade individual churches, TW has kept the vitality index of each church strictly private.

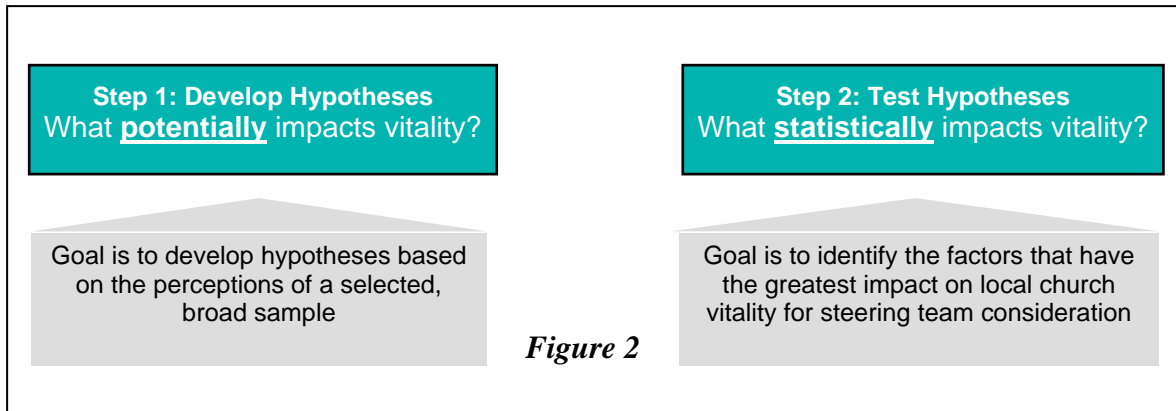
TW used another statistical technique, factor analysis, to group these indicators of Church Vitality into three factors that encompass different aspects of church vitality. Identifying these factors can help the UMC better understand how to impact different aspects of church vitality. The factors are: attendance, growth, and engagement.

Factor	Indicators of Vitality
<b>Attendance</b>	<ul style="list-style-type: none"> <li>• Average worship attendance as percentage of membership</li> <li>• Number of children, youth, and young adults attending as a percentage of membership</li> </ul>
<b>Growth</b>	<ul style="list-style-type: none"> <li>• Change in average worship attendance as percentage of membership over five years</li> <li>• Change in membership over five years</li> <li>• Change in annual giving per attendee over three years</li> <li>• Change in financial benevolence beyond the local church as a percentage of church budget over five years</li> </ul>
<b>Engagement</b>	<ul style="list-style-type: none"> <li>• Professions of faith per attendance</li> <li>• Annual giving per member</li> </ul>

To address the multiple dynamics of congregational vitality the indicators are collective, not singular (like vital signs for a person’s health). TW analyzed multiple years of available data on these indicators from nearly all North American UMC churches to identify the distribution of relative vitality. We found that approximately 15% of the 32,228 churches (a total of 4,961) met this threshold – many of these demonstrated excellence in all three factors of vitality.

**Identifying the Drivers of Vitality: Research Methodology**

Simply put, the research methodology involved two steps (as shown in Figure 2):



In Step 1, performed in February and March 2010, TW cast a very broad net to identify factors that could potentially be drivers of church vitality. TW gathered a significant amount of qualitative data via surveys, interviews, observations, church visits, and other exercises - e.g., interviews with over two dozen pastors, lay leaders, Bishops, and Agency leaders; several hundred survey responses; input from Conference Appointment Meetings and other meetings. They sought to capture and draw upon a variety of perspectives from across the UMC so that the resulting hypotheses would fully reflect the range of factors that possibly impact vitality - reflecting churches from very small to very large, urban, rural, suburban, conservative, progressive, ethnic minority, etc. TW collected sufficient information to identify common thematic areas of focus and worked very intensely with the Steering Team at its meeting on April 7 & 8. Several hundred hypothesis were examined and 130 were identified to be tested (e.g., age of the church, number of programs designed for youth, type of music used in worship services).

In Step 2, TW tested each hypothesis to identify relationships between factors and outcomes. Much of the data has been collected and tracked for some years by the UMC but we supplemented the existing data by capturing significant additional quantitative data via several different types of organization-wide surveys. This data was collected from a representative sample of Churches, Pastors, District Superintendents and Bishops – providing data on the dynamics at thousands of churches.

In traditional polling exercises that are reported in the media, sample sizes of approximately 500 people are often used – producing findings that are statistically reliable within a margin of error of plus or minus 4% to 5%. The much larger, fully representative sample of churches on which data was collected for this project allowed us to produce statistically reliable findings within a much smaller margin of error.

TW used regression and another statistical technique, ANOVA (analysis of variance) to identify, for all of the churches, which of the drivers had a statistically

significant impact on the indicators of Church Vitality. In these processes, each factor is independently tested, holding all of the other factors constant, to determine if it has an impact and if so, the extent to which it has a neutral, positive or negative impact on vitality. In this way, we identified for the Steering Team the specific drivers of vitality statistically associated with the 16% of UMC churches that were identified as highly vital churches. Again, for appropriate purposes of confidentiality, TW is holding the results for each church, sharing only the aggregate results with the Steering Team.

The analysis identified four areas described in more detail in the Steering Team report: Small Groups and Programs, Worship, Lay Leadership and Pastoral Leadership. These areas were not just related to the vitality of a single church or a handful of churches. ***These areas were found to have a strong, positive impact on the Indicators of Church Vitality across thousands of churches. There are examples of churches with high vitality that have been successful in each of these areas in every district in North America, in larger churches, in smaller churches, in predominantly minority churches in churches in urban communities and in churches in suburban or rural communities.*** The findings are also mutually reinforcing. Improvements in any one area are likely to contribute to improvements in the other three.

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# Appendix 5

## **Towers Watson**

### Potential Drivers of Congregational Vitality

The United Methodist Church

Potential Drivers of Congregational Vitality



The United Methodist Church  
Potential Drivers of Congregational Vitality

	Hypothesis Topic	Potential Driver
1	Pastor leadership	How would you rate Pastor XYZ: Works in partnership with others (e.g., lay leaders, congregation) to accomplish goals
2	Pastor leadership	How would you rate Pastor XYZ: Recognizes, addresses, and manages discord in a fair and positive manner
3	Pastor leadership	How would you rate Pastor XYZ: Encourages involvement and empowers others to take ownership
4	Pastor leadership	How would you rate Pastor XYZ: Focuses on developing, coaching and mentoring to enable Laity leadership to improve performance and to reach their full potential
5	Pastor leadership	How would you rate Pastor XYZ: Inspires passion and enthusiasm in others for spiritual development, discipleship, and outreach
6	Pastor leadership	How would you rate Pastor XYZ: Focuses on developing personal knowledge, skills, and abilities to continuously improve and grow oneself
7	Pastor leadership	How would you rate Pastor XYZ: Defines and articulates a future vision for the local church
8	Pastor leadership	How would you rate Pastor XYZ: Inspires confidence and trust through words and deeds
9	Pastor leadership	How would you rate Pastor XYZ: Demonstrates effective management of the local church (e.g., financial, operational, staff)
10	Pastor leadership	How would you rate Pastor XYZ: Has ability to influence the actions and behaviors of others to accomplish changes in the local church
11	Pastor leadership	How would you rate Pastor XYZ: Recognizes, understands, and empathizes with the feelings and needs of others and responds accordingly
12	Pastor leadership	How would you rate Pastor XYZ: Through effective leadership, propels the local church to set and achieve significant goals
13	Pastor leadership	How would you rate Pastor XYZ: Understands and leads in the context in which they serve
14	Pastor leadership	How would you rate Pastor XYZ: Inspires congregation through preaching
15	Pastor leadership	Does local church have a formal, written mission and vision that has been reviewed in the last five years
16	Pastor demographics	Pastor age
17	Pastor demographics	Pastor seminary school
18	Pastor demographics	Tenure in current appointment
19	Pastor demographics	Years since first appointment
20	Pastor demographics	Number of appointments since seminary school
21	Pastor demographics	First or second career ministry
22	Pastor demographics	Level of Connection the Pastor has to the overall Church
23	Pastor demographics	Rate the general orientation of the Pastor from liberal to conservative
24	Pastor demographics	Level of involvement in local community beyond church
25	Pastor demographics	How Pastors spend their time (% of time across categories in a typical week)
26	Laity leadership	Number of lay leaders in all Sunday church school groups
27	Laity leadership	Number of lay leaders in all other groups
28	Laity leadership	% of lay leaders who participate in continuing education programs offered through the Church
29	Laity leadership	% of lay leader positions filled by young adults
30	Laity leadership	% of lay leader positions filled by members with less than three years of tenure
31	Laity leadership	% of attendees who currently serve as lay leaders
32	Laity leadership	% of attendees who have served as lay leaders in the last five years
33	Laity leadership	Age make-up of lay leaders (%ages by age brackets)
34	Laity leadership	Effectiveness of lay leaders in driving vitality in the local church
35	Laity leadership	How are lay leaders selected for their leadership roles
36	Diversity	To what extent does the demographic mix of your attendees reflect the demographic mix of the community

The United Methodist Church  
Potential Drivers of Congregational Vitality

	Hypothesis Topic	Potential Driver
37	Diversity	Rate the general orientation of the congregation from liberal to conservative
38	Diversity	Percentage of attendees (not members) who are NOT from a UMC background
39	Diversity	To what extent is your church using and analyzing demographic data to shape the local church mission and outreach
40	Church demographics	Age of the physical church
41	Church demographics	Year when the local church was founded
42	Church demographics	Has the church moved or combined with another UMC church in past 10 years
43	Church demographics	Neighborhood category (e.g., rural, urban, suburban)
44	Church demographics	Average household income of zip code
45	Church demographics	Years since last remodel
46	Church demographics	Number of UMC churches in a 10 mile radius
47	Church demographics	Number of non-UMC churches in a 10 mile radius
48	Church demographics	Perceived change in community population (increased, decreased, stayed the same)
49	Church demographics	Perceived changes in community income (increased, decreased, stayed the same)
50	Church demographics	Attendance as a percentage of seating capacity in local church
51	Church demographics	Allocation of financials
52	Church demographics	Number of pledges and identified givers
53	Church demographics	Income sources
54	Christian Education	Christian Education program attendance as a percentage of worship attendance
55	Christian Education	Number of children (0-6th grade) in all Sunday church school groups
56	Christian Education	Number of children (0-6th grade) in all other groups
57	Christian Education	Number of children (0-6th grade) in alternative Christian Education church school groups
58	Christian Education	Number of youths (7-12th grade) in all Christian Education church school groups NOTE: team wants "Christian Ed" substituted for Sunday church school, but need final wording to come from LCR
59	Christian Education	Number of youths (7-12th grade) in all other groups
60	Christian Education	Number of youths (7-12th grade) in alternative Christian Education church school groups
61	Christian Education	% of youth (7-12th grade) (member or non-member) participating in confirmation preparation classes
62	Children's Programs	Number of children programs
63	Children's Programs	% of children (member or non-member) actively participating in programs NOTE: if percentage, we want to compare to total church attendance
64	Children's Programs	Responsibility for childrens programs (senior Pastor vs. associate Pastor vs. Staff vs. unpaid laity)
65	Children's Programs	Number of local mission outreach programs designed for children to participate in themselves
66	Children's Programs	Number of global mission outreach programs designed for children to participate in themselves (may be doing work, not physically going overseas themselves)
67	Youth Programs	Number of youth programs
68	Youth Programs	% of youth (member or non-member) actively participating in programs
69	Youth Programs	Responsibility for youth programs (senior Pastor vs. associate Pastor vs. Staff vs. unpaid laity)
70	Youth Programs	Number of local mission outreach programs designed for youth to participate in themselves
71	Youth Programs	Number of global mission outreach programs designed for youth to participate in themselves (the idea is that they can do work, not necessarily go overseas)
72	Youth Programs	% of youth attendees whose parents are not members of the local church
73	Young Adult Programs	Number of young adult programs

The United Methodist Church  
Potential Drivers of Congregational Vitality

	Hypothesis Topic	Potential Driver
74	Young Adult Programs	% of young adult (member or non-member) actively participating in programs
75	Young Adult Programs	Responsibility for young adult programs (senior Pastor vs. associate Pastor vs. Staff vs. unpaid laity)
76	Young Adult Programs	Number of local mission outreach programs designed for young adults to participate in themselves
77	Young Adult Programs	Number of global mission outreach programs designed for young adults to participate in themselves
78	Adult Programs	Number of adult programs
79	Adult Programs	% of adults (member or non-member) actively participating in programs
80	Adult Programs	Responsibility for adult programs (senior Pastor vs. associate Pastor vs. Staff vs. unpaid laity)
81	Adult Programs	Number of local mission outreach programs designed for adults to participate in themselves
82	Adult Programs	Number of global mission outreach programs designed for adults to participate in themselves
83	Committed Congregation	How engaged is the congregation in living the mission and vision of the local church
84	Group Ministries	Number of small groups (study, fellowship, service)?
85	Group Ministries	Average number of participants in group ministries
86	Group Ministries	% of attendees serving or having served as group ministry leaders during past three years
87	Group Ministries	% of non-members participating in small groups
88	Evangelism	Number of evangelism outreach ministries excluding weekly worship services
89	Evangelism	% of attendees participating in evangelism ministries excluding weekly worship services
90	New Members	Do you have a new member class offered regularly?
91	New Members	Percent of members who joined within past year who are members of small group ministries
92	Welcoming Visitors	Established process for welcoming visitors (e.g., designated members to spot and welcome new members)
93	Welcoming Visitors	What percentage of first-time guests eventually become members?
94	Welcoming Visitors	Adequate parking
95	Local community outreach	Number of new local outreach programs created in the last year
96	Worship services	Predominant type of music used in the worship
97	Worship services	Variation of worship from week to week
98	Worship services	Average attendees per service by service style
99	Worship services	Number and type of different services held weekly
100	Worship services	Regular use of multi-media format during worship
101	Worship services	Regular use of experiential activities during worship (e.g., prayer station, art, straw polls)
102	Worship services	Average length of sermon
103	Worship services	Percentage of service led by laity, youth, and young adults and children
104	Worship services	Percentage of preaching by type: lectionary, expository, blended
105	Worship services	Type of sermon (Inspirational vs. Teaching/Learning vs. Biblical interpretation)
106	District	% of time (per year) spent with thriving churches
107	District	% of time (per year) spent with failing churches
108	District	% of time (per year) spent developing new churches
109	District	Number of churches in the District
110	District	Number of new churches started in the District within the last two years
111	District	% of time spent coaching Pastors on leadership skills and achieving goals
112	District	Use of formal goal-setting for Pastors
113	District	Use of formal performance reviews throughout the year with Pastors
114	District	Use of formal performance evaluation with Pastors

The United Methodist Church  
Potential Drivers of Congregational Vitality

	Hypothesis Topic	Potential Driver
115	Bishop	If a conference-wide performance evaluation exists, to what extent is it formally used in the appointment process
116	Bishop	Holding Pastors accountable for performance
117	Bishop	% of time (per year) providing coaching and support
118	Bishop	What programs are used in the Conference to promote vitality? (multiple choice - UMC Training, Non-UMC Training, Coaching, church clusters, etc.)
119	Bishop	Percent of Pastors who participate in continuing education programs available through the Conference
120	Bishop	% of Pastors appointed during three year provisional period
121	Bishop	# of Pastors on clergy effectiveness performance plans
122	Bishop	# of Pastors exited through clergy effectiveness (not retirement)
123	Bishop	Effectiveness of the DS team in coaching and developing Pastors
124	Church Connection	Number of special communications, events, sermons per year addressing the connection-wide events
125	Church Connection	% of apportionment paid over last three years
126	Church Connection	Number of UMC connectional speakers who visit and present at worship or small group ministries per year
127	Church Connection	Percent members/regular attendees participating in District or Conference activities or on committees, task groups, boards

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# Appendix 6

## **Towers Watson** Survey Methodology

Call to Action—Research Project  
Survey Methodology Summary

# CALL TO ACTION PROJECT

Background Information

Towers Watson Research

In the first phase of our Call to Action Research, we conducted a number of interviews, facilitated discussions, and created a brief online survey to gather people's perceptions of what vitality in congregations is and what are the factors that drive it. That first phase of the research was designed to reveal people's perceptions in order to develop hypotheses on what they thought drives church vitality.

Now that this phase is complete, we are moving on to the second phase of the research, which focuses on using data, not people's perceptions, to help us better understand what drives church vitality. This second phase of the project relies heavily on data that already exists across the UMC but there is also data that we need that hasn't been regularly collected. For that reason, we are conducting a number of online surveys designed to gather more quantitative data to test the hypotheses developed in the first phase of this project. Below is a summary of the surveys that we are using.

## ***Summary of Surveys***

### **Bishop Survey**

This online survey will be completed by all active Bishops in North America and contains less than 10 questions, all focused on their annual conferences.

- The Bishops will receive an e-mail from Bishop Gregory Palmer, President of the Council of Bishops, with information about the survey and a link to the online survey.
- Bishops will have two weeks to complete the online survey and it should take less than 5 minutes to complete.

### **District Superintendent Survey**

This online survey will be completed by all District Superintendents in North America and contains questions about their districts as well as questions about the pastors within the district. When responding to the questions about pastors, a sample of no more than 10 pastors will be selected for each district superintendent to assess.

- All district superintendents in North America will receive a "heads up" e-mail from Bishop Gregory Palmer with information on the survey and when to expect it.
- Following Bishop Palmer's e-mail, all district superintendents will receive an e-mail from Towers Watson with a link to the online survey.
- District Superintendents will have two weeks to complete the online survey.

### **Pastor Survey**

Approximately 25% of all UMC churches were randomly selected to participate in this research. For each one of those churches, the Lead/Senior Pastor will be asked to complete an online survey asking questions about themselves as well as his or her congregation.

- Lead/Senior Pastors at approximately 25% of churches will receive an e-mail from Towers Watson with a link to the online survey.
  - If the link is sent to someone other than the Lead/Senior Pastor, the instructions are to forward the survey to the Lead/Senior Pastor.
- Lead/Senior Pastors will have two weeks to complete the online survey.

## Call To Action – Research Project Survey Methodology Summary

### Church Survey

For the 25% of churches that are sampled for this research, another survey is designed to gather data about the church itself. Pastors can complete this survey themselves or they can send it along to another leader in their church.

- The link to the Church Survey will be included in the e-mail from Towers Watson to Pastors.
- Pastors will have the option to complete the Church Survey themselves or send the link to another key leader, paid or volunteer, in their church.
- Pastors or their delegates will have two weeks to complete the online survey.

### Staff Parish Relations Chair Survey

For the 25% of churches that are sampled for this research, another survey is designed for the Chair of the Staff Parish Relations Committee to provide their assessment of the Lead/Senior Pastor. The link to this online survey will be sent to the district superintendent, who will e-mail it to the Chair of the Staff Parish Relations Committee.

- A link to the Staff Parish Relations Committee Survey will be sent in an e-mail from Towers Watson to District Superintendents along with a list of the churches in their District that are part of the sample.
- District Superintendents will send the link to the online survey to the Chair of the Staff Parish Relations Committee in the churches that have been sampled.
- The Chair of the Staff Parish Relations Committee will have two weeks to complete the online survey.

### Church Leaders Survey

It's important that we get perspectives from across UMC so an online survey with questions about the church will be available on the UMC website.

- A link to the Church Leaders Survey will be available at [www.umc.org/calltoaction](http://www.umc.org/calltoaction).
- Individuals who do not receive a survey directly from Towers Watson or Bishop Palmer can complete this survey.
- The survey will be available on the website for two weeks.

## Summary of Roles

### Bishop's Role

- Complete the Bishop Survey by clicking on the link provided in Bishop Palmer's e-mail.
- Encourage participation of the District Superintendents and Pastors in the other surveys that are part of the CTA Research project.

### District Superintendent's Role

- Complete the District Superintendent Survey by clicking on the link provided in the e-mail from Towers Watson.
- Encourage participation of the Pastors and other church leaders in the other surveys that are part of the CTA Research project.
- Send the link to the Chair of the Staff Parish Relations Committee survey (from Towers Watson) to those churches that are part of the sample.

### Pastor's Role

- Complete the Pastor Survey by clicking on the link provided in the e-mail from Towers Watson.
- Encourage participation of the Pastors and other church leaders in the other surveys that are part of the CTA Research project.
- Either complete the Church Survey (via second link in e-mail from Towers Watson) or forward it on to another leader in the Church.



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