



THE UNITED METHODIST CHURCH

APPENDICES

Operational Assessment Project

Report to the Call to Action Steering Team



APEX HG LLC

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APPENDICES

Operational Assessment Project

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APPENDIX A

TUMC ENVIRONMENT REVIEW AND ASSESSMENT

Executive Summary

Global Summary

- Global membership grew from 1998 to 2005 as US declines were offset by non-US growth. From 2005 to 2008, global membership declined due to US declines and a significant decline in the Congo Central Conference.
- The Church experienced declines in total churches and preaching places from 1998 to 2008 both in the US and non-US regions. The non-US region decline was driven by increases in the West Africa and Philippines Central Conferences more than offset by a decline in the Congo Central Conference.
- Additional detailed data is not available on a global basis.

US Summary

- Membership, Attendance and Number of Churches – 1998 to 2008 Period (the "Period")
 - The US Church experienced Period declines in membership and average weekly worship attendance of 7% and 9%, respectively. The heaviest declines occurred in the North Central, Northeastern and Western Jurisdictions. In 2008, 60% of the membership resided in the Southeastern (37%) and South Central (23%) Jurisdictions.
 - On the basis of church size, membership distribution shifted away from churches with 200 to 999 members and to churches with 3,000+ members – attendance followed a similar pattern.
 - During the same Period, the number of US churches declined by 6%. Membership distribution remained constant at the 199 member and less church size due in part to the fact that churches of this size accounted for three percentage points more of the total church inventory by the end of the Period (2008). Churches in the 300 to 499 member size category declined by one percentage point of total church inventory over the Period.
 - The Church's ethnic/racial membership demographic profile remains little changed over the Period, with a three percentage point increase in the "White" demographic and a one percentage point increase in the "African American/Black" demographic as a percentage of total church membership - in 2008, the Church membership was predominantly "White" (90%).

- Data from 2009 showed that the Church is significantly generation bound relative to US age demographics with approximately double the US age representation in the age 65 and older segment and approximately half the US age representation in the age 18 to 44 segment.
- Faith Trends over the Period
 - Professions of Faith and Baptisms declined over the Period by 25% and 31%, respectively.
 - Faith Restored increased by 25% over the Period.
- Clergy Trends over the Period
 - Total Annual Conference clergy (including local pastors/FL/PL) increased by 3% over the Period – excluding local pastors/FL/PL, clergy declined by 2% over the Period. Local pastors/FL/PL increased by 54% over the Period.
 - Clergy growth occurred primarily in the Southeastern Jurisdiction with little or no growth in the remaining jurisdictions.
 - Although there have been significant nominal increases in diverse clergy ethnic/racial categories over the Period, total clergy remain predominantly “White” (88%) and male (76%) in 2008. Female clergy have become an increasing percentage of total clergy over the Period and, although this trend has occurred across all jurisdictions, significant variation remains among jurisdictions in 2008.
 - Average age of clergy rose from 49 in 1998 to 54 in 2008.
- Financial Trends and Profile Data over the Period
 - Total Local Church Expenditures increased by 49% over the Period and, on a per member and per attendee basis, by 61% and 64%, respectively, over the Period. These trends were experienced by all jurisdictions with substantive variation in expenditures per member/attendee and rate of increase among jurisdictions.
 - The estimated 2008 local church expenditure profile is as follows: 36% building, maintenance and debt payment, 34% clergy and lay staff salary and benefits, and 20% apportionments and other benevolent giving and program expenses.
 - Over the Period, local church inflation adjusted benevolent spending forwarded to the Annual Conference declined by 22% while other local church inflation adjusted benevolent spending increased by 77%.
 - General Church paid apportionments increased by 24% over the Period.
 - The estimated 2008 market value of total Church real estate holdings was almost 15 times the Church’s total indebtedness.
 - In 2008, estimated net funds flow was positive across all jurisdictions. However, 77% and 16% of the estimated positive funds flow originated from the Southeastern and South Central Jurisdictions, respectively, for a total of 93% of total 2008 net funds flow.

Project Survey Findings Regarding Environmental Understanding and Organization Change Dynamics

Below is a summary of change dynamics findings – See Appendix C for complete findings.

Survey respondents evaluated the following groups in the parameters of the environmental assessment: Bishops as individuals, The Council of Bishops as a collective entity, General Agency executives, General Agency Board and Commission members, Annual Conference leadership, pastors in local churches and lay leadership in local churches.

- In terms of degree of understanding of the Church's trends, dynamics and circumstances, all groups except lay leadership were thought to have an Average or Above Average understanding – Bishops as individuals and as a Council were thought to have the highest understanding with Bishops as individuals higher than the Council.
- Belief in need for change showed a similar pattern with the difference that all groups were thought to have an Above Average belief in need for change with the exception of lay leadership which was Below Average – again Bishops as individuals and as a Council were thought to have the highest belief in need for change with Bishops as individuals higher than the Council.
- Willingness to lead change was another parameter on which respondents were asked to rank the various groups. Bishops and individuals and as a Council were thought to have an Above Average willingness to lead change (individuals higher than Council) and Annual Conference leadership was considered to have an Above Average willingness to lead change. General Agency executives were rated Average and the remaining groups Below Average with lay leadership the lowest.
- Likely resistance to change was thought to be highest (Above Average) among General Agency executives and governing members and lay leaders with pastors lower but still Above Average. Bishops as individuals and as a Council were considered to have likely resistance to change of Below Average.

Introduction

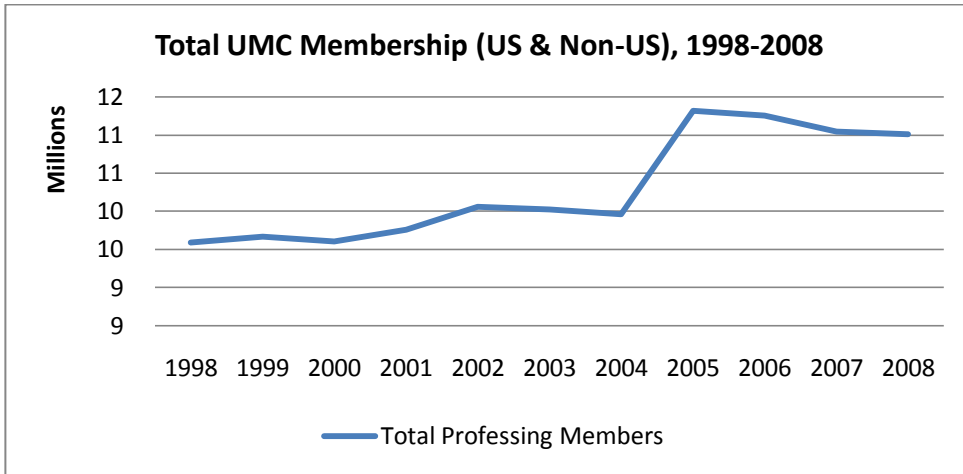
The following document provides a review of information that was collected to establish an understanding of the United Methodist church's external and internal environment in order to create a basic context for this report. The information was collected to cover the most recent ten year period for which data is available – 1998 to 2008 – under the basic premise that ten years is a reasonable “actionable” period of time leading up to the Church's current circumstances. In some cases, requested information was not available and, in general, there were concerns expressed regarding information consistency, accuracy, and reliability. The information collected for this period includes membership and attendance trends, church and preaching places trends, membership/attendance demographics, faith trends, clergy trends, and financial trends.

The External Environment and the Religious Landscape in the United States

The United Methodist Church is a global church with its membership and financial support primarily residing in the United States. In this report, we do not wish to over or understate the importance of the Church's “external environment”, but rather to acknowledge the substantial forces, many which the Church is a part of, which have an influence on the Church's destiny. Many of these forces have been well documented so we will not repeat them in detail here, but we wish to acknowledge them specifically below.

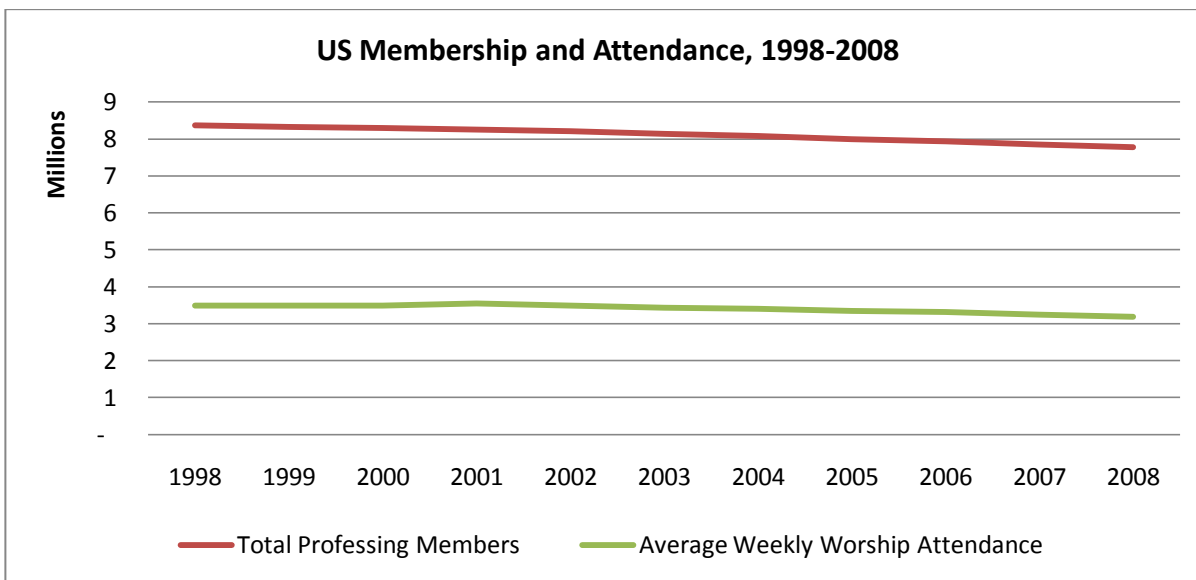
- Continuing shifts in the global politics of humanitarian aid and crisis intervention.
- The recent and continuing financial shocks in the U.S. and much of the “western world” and the continuing growth and vibrancy of the “emerging markets”.
- Technology driven changes in media and social networking.
- Aging demographics and changing racial and ethnic demographics in the U.S. and much of the “western world”.
- Change in the U.S. religious landscape as well documented in the following Studies:
 - “U.S. Religious Landscape Survey”, Pew Forum on Religion and Public Life, February, 2008.
 - “Religion Among the Millennials”, Pew Forum on Religion and Public Life, February, 2010.

TUMC Membership and Attendance Trends



Sources: Annual Conference Statistical Reports

Total TUMC membership grew from 1991 through 2005 due to growth outside of the United States. (Note: data reporting outside the US may lack consistency.) Total membership has declined from 2005 through 2008, with declines in both the US and non-US geographies, again qualified by potential non-US geography data issues.. Global membership of approximately 11.01 million in 2008 was distributed with approximately 71% in the US and 29% outside of the US. US membership and attendance declined by 7% and 9%, respectively, between 1998 and 2008.

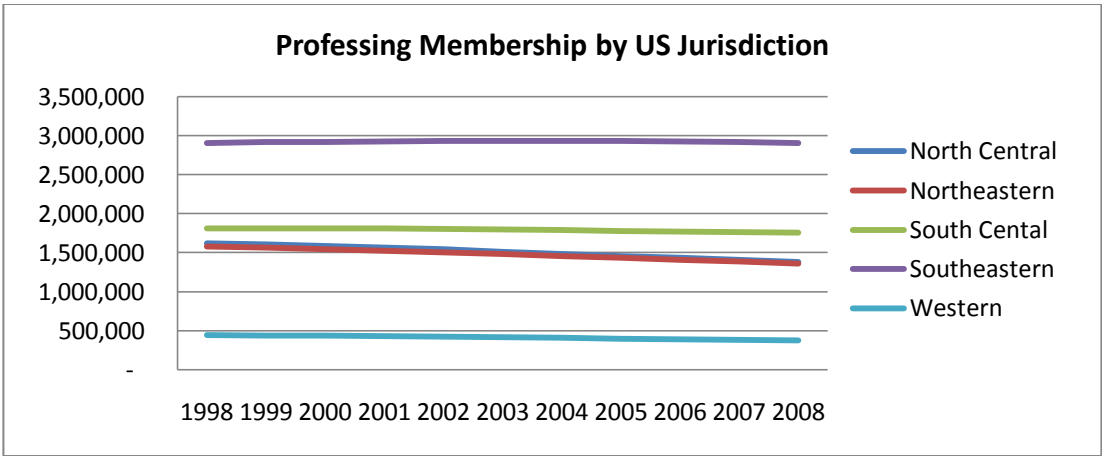


Source: Annual Conference Statistical Reports (For US, Table 1)



Sources: Annual Conference Statistical Reports

From 1998 to 2008, professing membership by US Jurisdiction has declined slightly in the Southeastern Jurisdiction (-2.9%) and has remained level in the South Central Jurisdiction. These two Jurisdictions accounted for 37% and 23%, respectively, of the US Professing Membership in 2008. During the same period, the remaining Jurisdictions experienced declines from 14.0% to 15.9%. The remaining Jurisdictions accounted for 40% of the US Professing Membership in 2008, with the Western at 5% and the Northeast and North Central Jurisdictions at 17% and 18%, respectively.



Source: US Local Church Statistics (Table 1)

During the period from 1998 to 2008 Central Conference professing membership growth was highest in the West Africa and Congo Conferences and these same conferences present the highest memberships among Central Conferences in 2008. The Germany and Northern Europe & Eurasia Central Conferences remained flat. Decline in membership in the Congo drove the overall decline in Central Conference membership from 2005 to 2008.



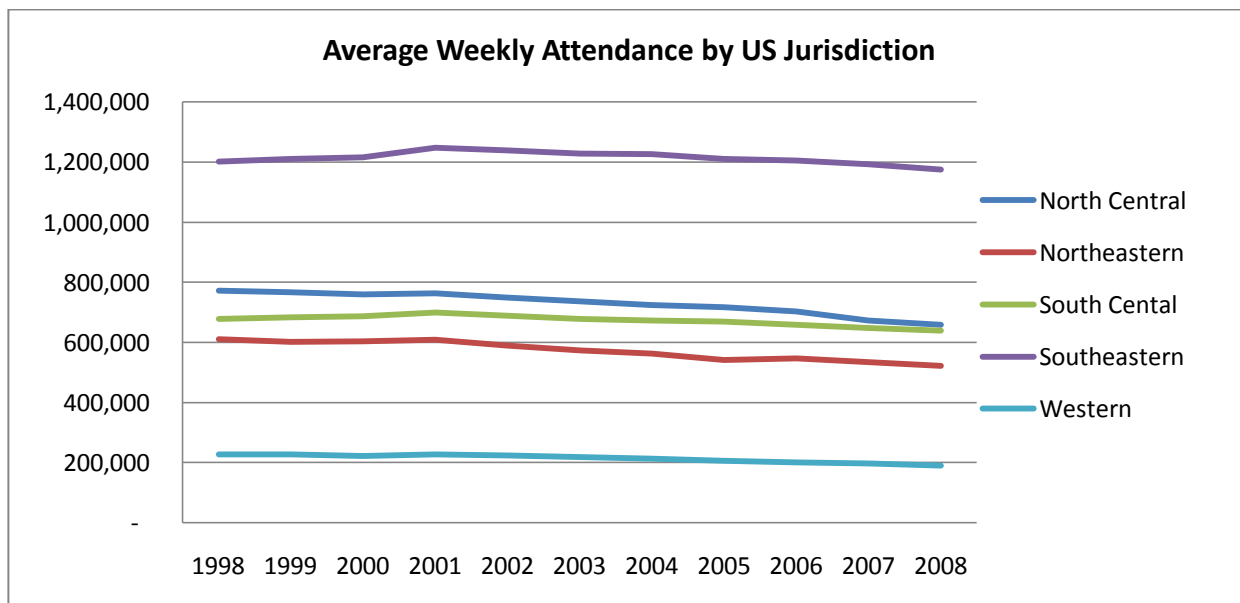
Sources: Annual Conference Statistical Reports

Footnote: Flat membership patterns may be due to non-reporting for several data years. When a conference does not report the previous year's data is carried forward. Most conferences submitted updated statistics in 2005 for the report, calculation of General Conference delegates.

West Africa – 2005 first year for Cote D'Ivoire statistical reporting (677,355 members reported)

Congo – 2005 large jump in North Katanga and Tanganyika/Tanzania reporting

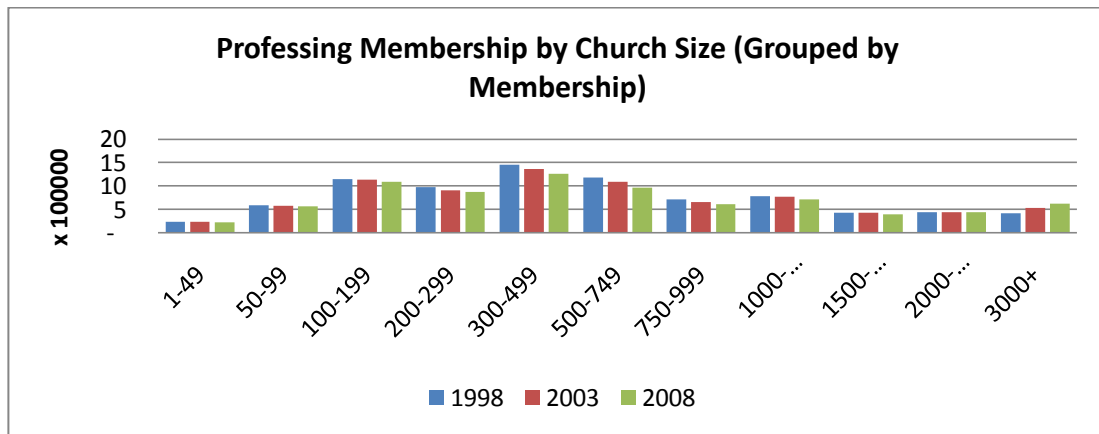
US Jurisdictions average weekly worship attendance has declined in every jurisdiction from 1998 to 2008. Interestingly, the North Central and Western Jurisdictions have the highest rates of average weekly worship attendance to professing membership. As with membership, attendance declines were most significant in the Western, Northeastern, and North Central Jurisdictions (17%, 15%, and 15%, respectively). Attendance data is not available for the Central Conferences.



Source: US Local Church Statistics (Table 1)

US Membership and Attendance Trends by Church Membership Size

From 1998 to 2008, absolute professing membership distribution has shifted slightly to churches with professing members of 3,000 or more. In percentage terms, membership in churches below 100 members and from 100-199 members remained constant from 1998 to 2008, at approximately 10% and 14% respectively. As can be seen from the table below, membership distribution declines occurred primarily in churches with 200 to 999 members. Church distribution by Church size remained relatively constant over the ten year period with 70% of churches below 199 members in 2008 versus 67% in 1998.



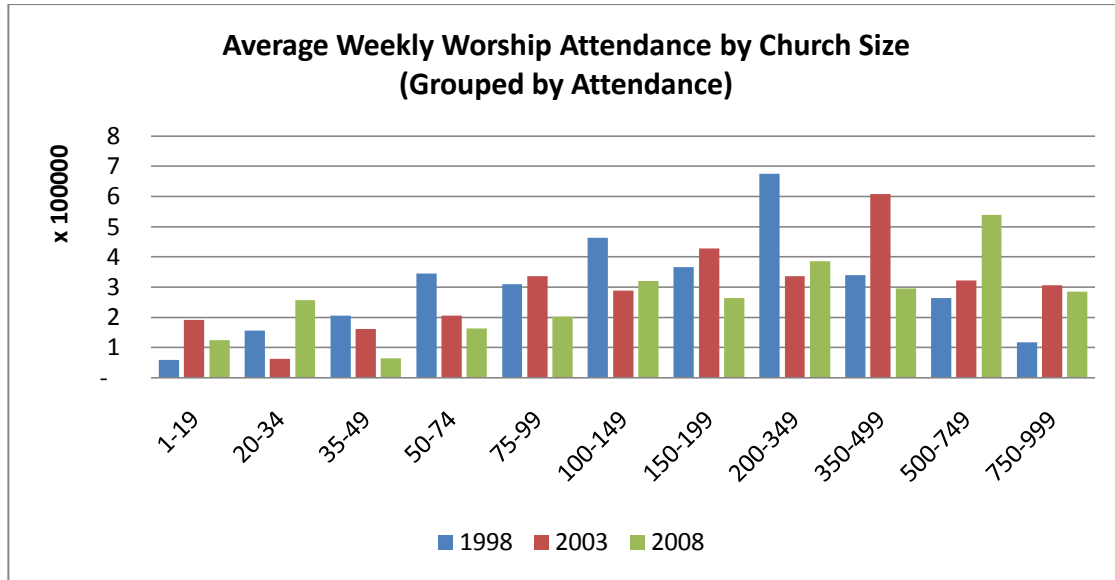
Source: US Local Church Statistics (Table 1)

Footnote: Membership categories from *General Minutes* distribution tables

2008 and 1998 US Membership and Church Distribution by Church Size

Church Size	Membership Distribution			Church Distribution		
	1998	2008	Change	1998	2008	Change
1-49	3%	3%	0%	22%	23%	1%
50-99	7%	7%	0%	23%	24%	1%
100-199	14%	14%	0%	22%	23%	1%
200-299	12%	11%	-1%	11%	11%	0%
300-499	17%	16%	-1%	11%	10%	-1%
500-749	14%	12%	-2%	5%	5%	0%
750-999	9%	8%	-1%	2%	2%	0%
1000-1499	9%	9%	0%	2%	2%	0%
1500-1999	5%	5%	0%	1%	1%	0%
2000-2999	5%	6%	0%	1%	1%	0%
3000+	5%	8%	3%	0.3%	0.4%	0%

The distribution of average weekly worship attendance by church membership size has followed a similar pattern over the same period.

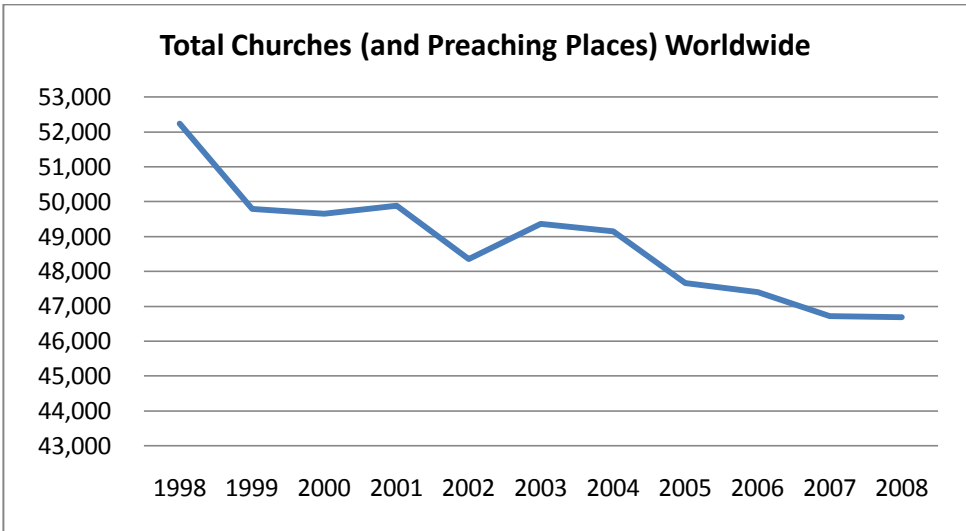


Source: US Local Church Statistics (Table 1)

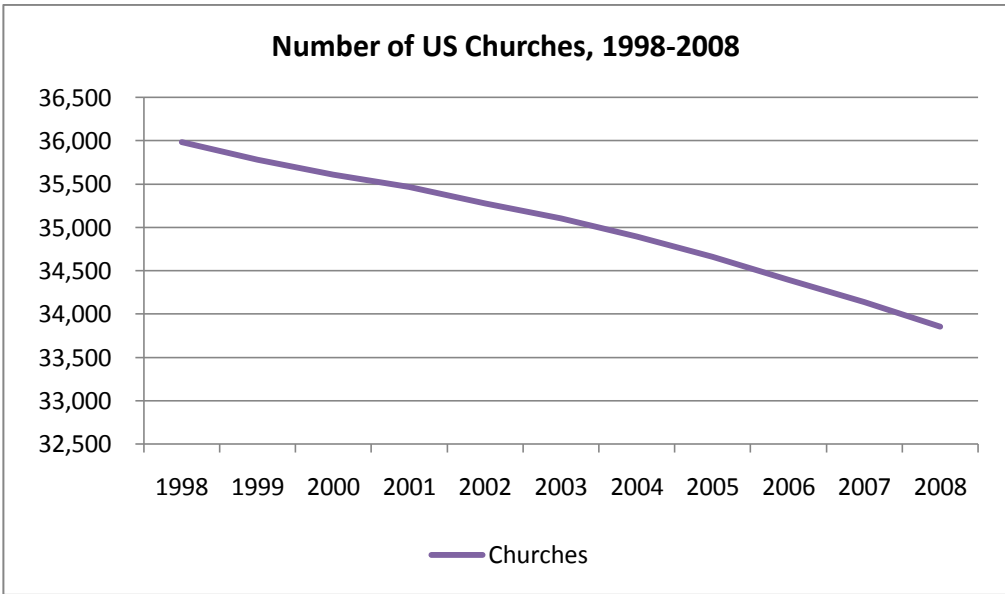
Footnote: Attendance categories from General Minutes distribution tables only include categories up to 999. In 2008, the number of churches with average weekly attendance of 1000 and greater was 153.

Church and Preaching Places Trends: 1998-2008

Total churches and preaching places appear to be declining over the 1998 – 2008 period, primarily driven by decline in the United States. The number of US churches declined by 6% over the period (in comparison to a 7% total decline in membership over the same period). Worldwide church and preaching places counts are affected by the consistency of Central Conference reporting, as is evidenced by the Central Conference trend data below.



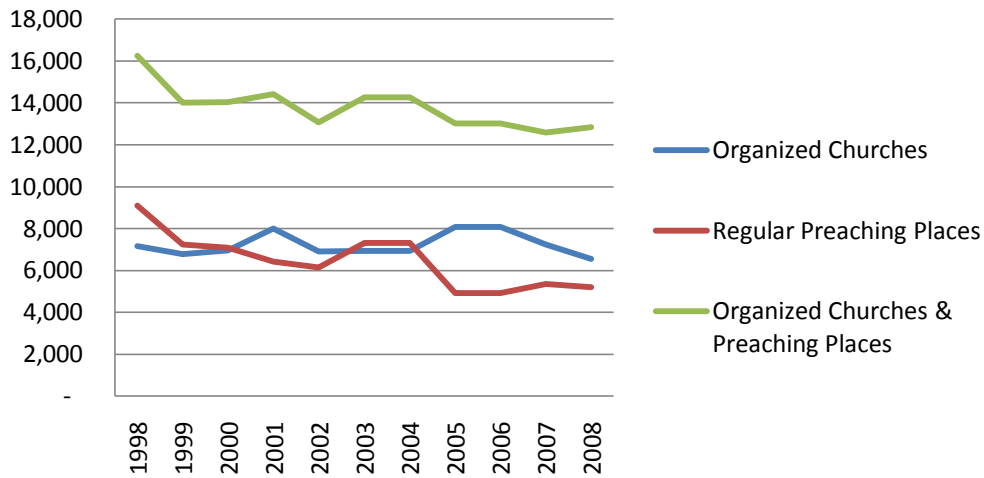
Source: *General Minutes* Recapitulation Table 2, Annual Conference Statistics



Source: *General Minutes* Recapitulation Table 2

Regular Preaching Places have declined more than Organized Churches outside of the US over the 1998 – 2008 period.

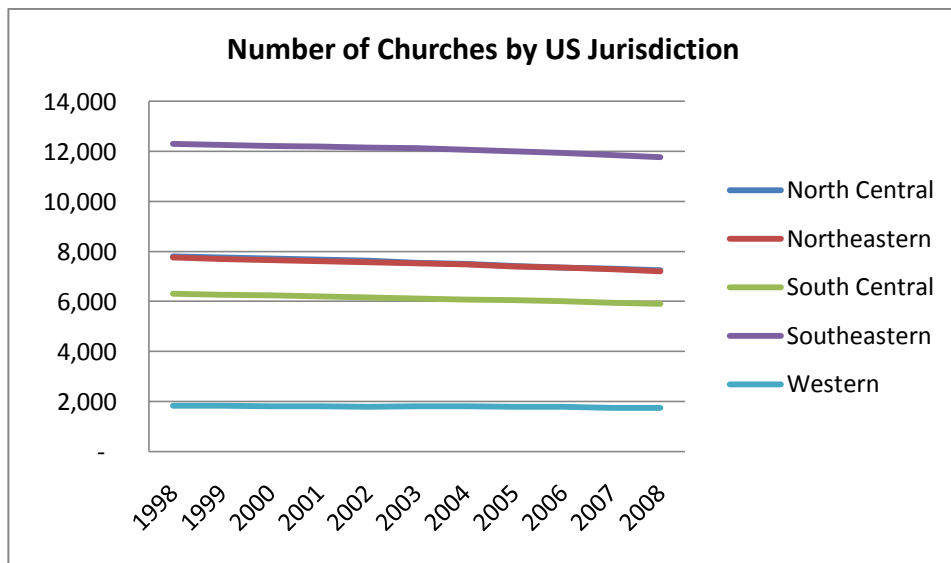
Organized Churches & Preaching Place Outside the US



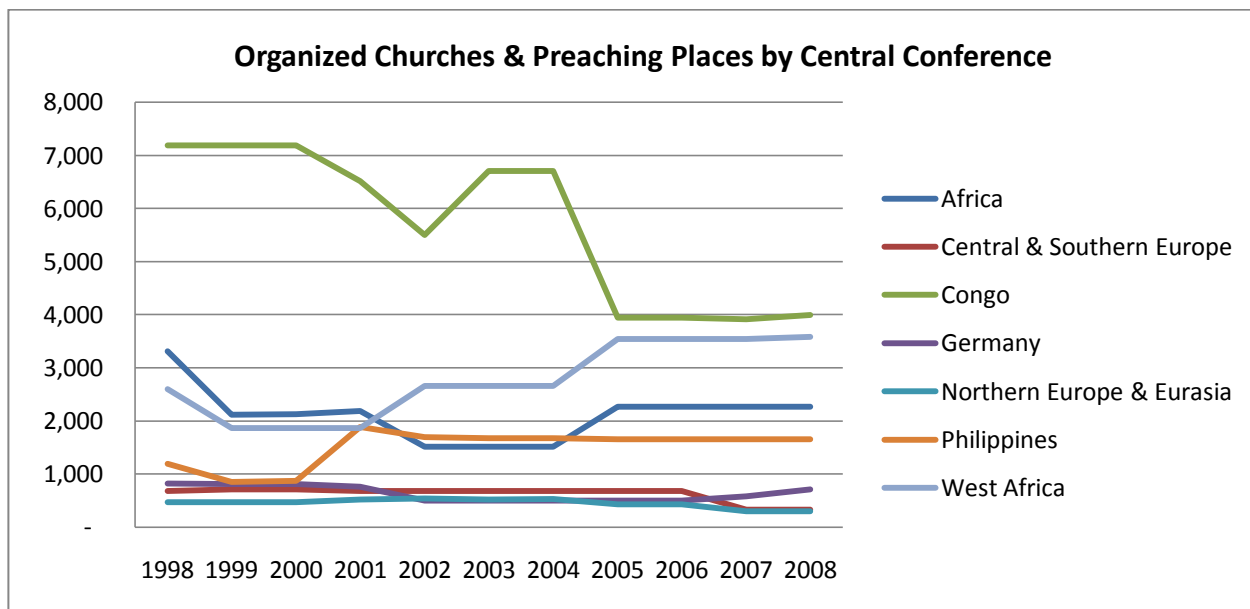
Source: Annual Conference Statistics

Footnote: Some non-reporting issues, missing data replaced with previous year's data.

In the US, all Jurisdictions have experienced declines in churches over the 1998 – 2008 period, although the Western Jurisdiction declines were minor.



Source: *General Minutes* Recapitulation Table 2
 Footnote: North Central and Northeastern lines are overlapping.

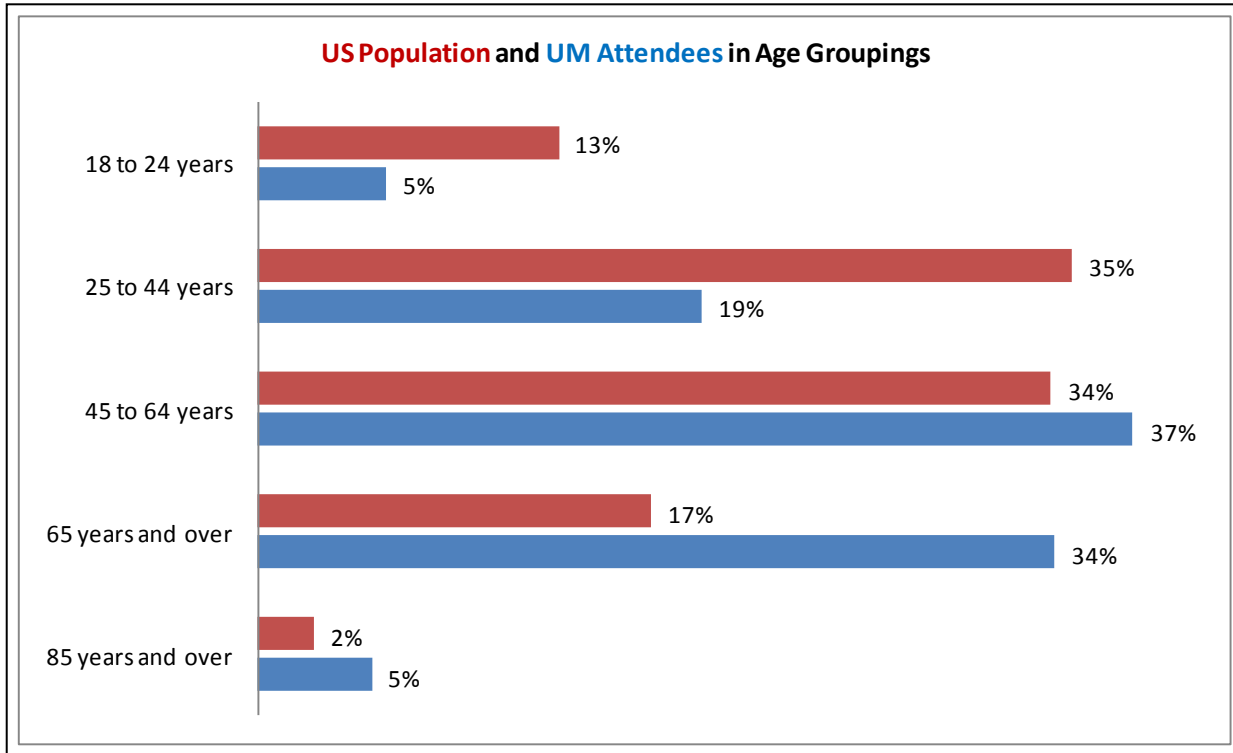


Source: Annual Conference Statistics
 Footnote: Some non-reporting issues, missing data replaced with previous year's data. Congo-Congo Central reported large decrease number of preaching places in 2005.

Although data reliability in Central Conference reporting may be questionable, the data would indicate an increasing trend line for West Africa and the Philippines, a decreasing trend in the Congo, and a relatively flat trend in the remaining Central Conferences for the 1998 – 2008 period.

TUMC Attendance and Membership Demographics

The United Methodist church in the United States has a significantly generation bound profile with approximately double the US age representation in the age 65 and older generations and approximately half the US age representation in the age 18 to 44 generations.



Source: US Congregational Life Survey 2009. Survey of individual worshippers in the pew on a given Sunday. Includes worshippers age 15 and up. Multiple members of household may have completed the survey.

Footnote: red represents US population (Census data); blue represents survey respondents

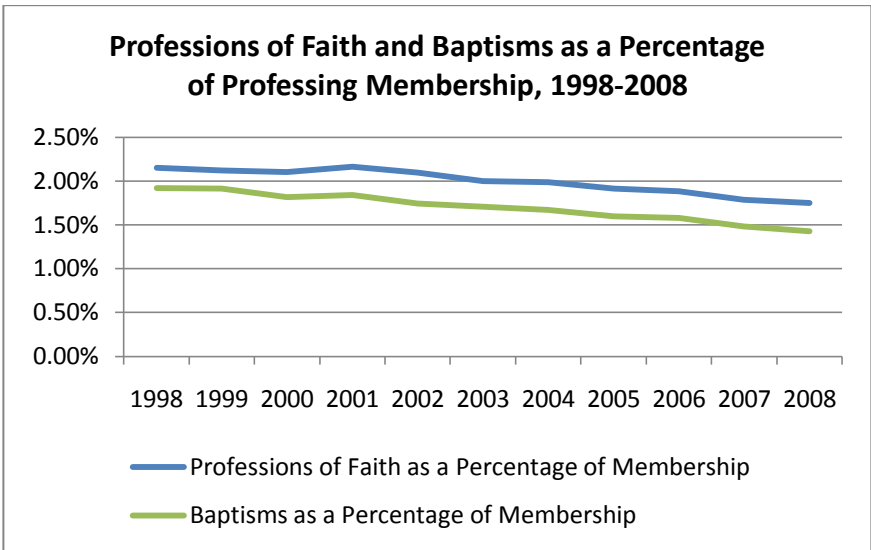
Membership Ethnic Demographics: 1998 and 2008		
% Membership Distribution		
	1998	2008
Asian	0.7%	1.1%
African American/ Black	4.6%	5.8%
Hispanic	0.5%	0.7%
Native American	0.2%	0.3%
Pacific Islander	0.1%	0.2%
White	86.9%	90.0%
Multi-Racial	NA	0.4%

Source: GCFA

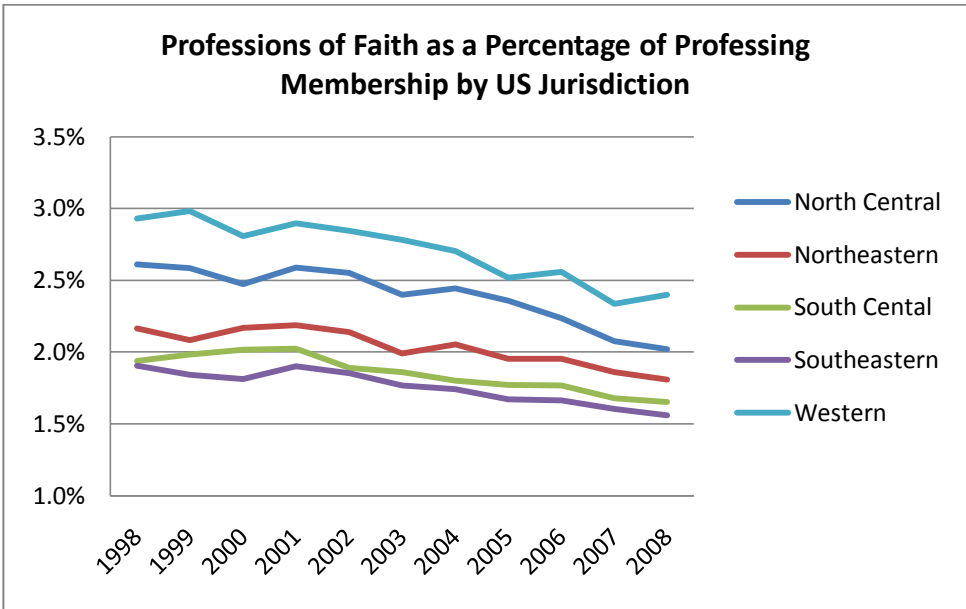
The Church's racial and ethnic profile has remained relatively constant over the 1998 to 2008 time period, remaining largely "white" in profile.

Faith Trends

Professions of Faith and Baptisms have experienced significant and steady declines from 1998 to 2008. These declines have occurred across all US Jurisdictions and across churches of all sizes. From 1998 to 2008, Professions of Faith declined 25% from a base of approximately 180,000 and Baptisms declined by 31% from a base of approximately 160,000. Faith Restored grew by 25% from a base of approximately 20,000 during the same period (source: GCFA – note: “faith restored” applies to affirmation events in which a person of Christian faith who has been inactive becomes active in the Church).



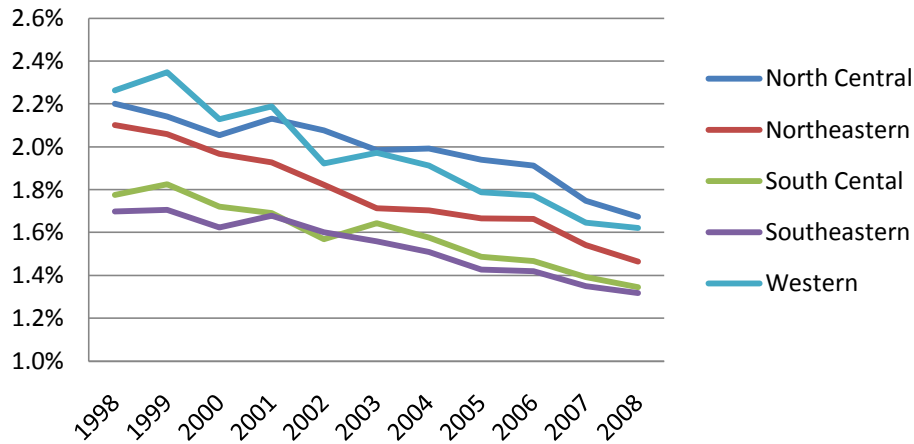
Source: Annual Conference Statistics (Table 1)



Source: Annual Conference Statistics (Table 1)

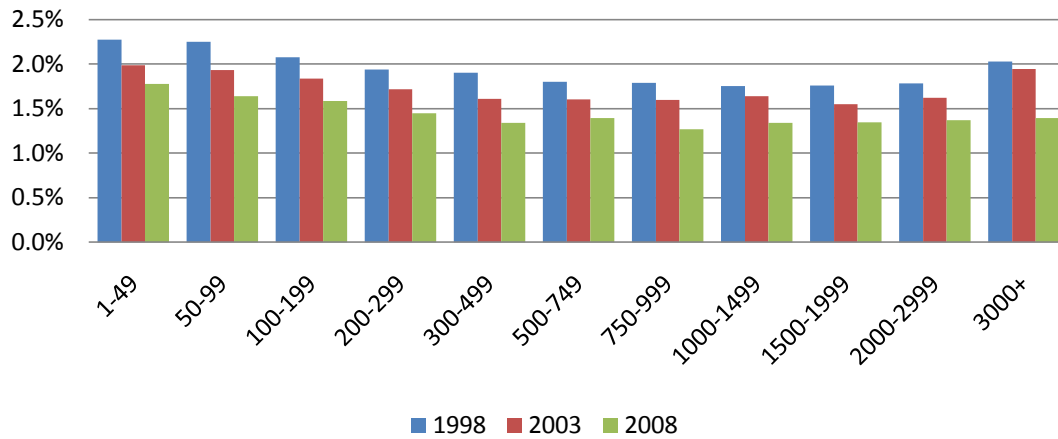
Footnote: Includes persons received on profession of faith

Baptisms as a Percentage of Professing Membership by US Jurisdiction



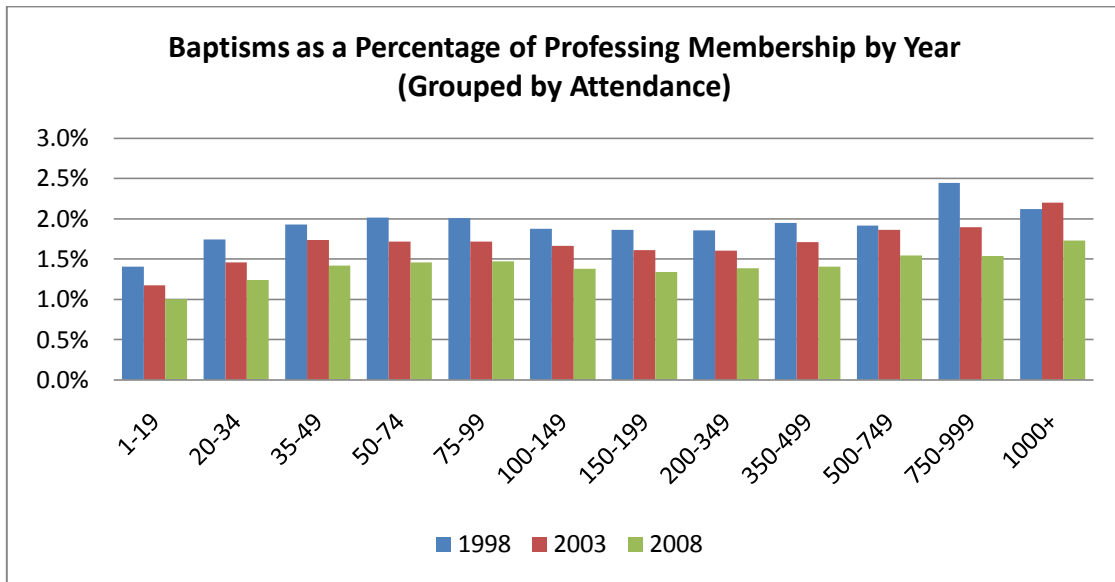
Source: Annual Conference Statistics (Table 1)

Baptisms as a Percentage of Professing Membership (Grouped by Membership)



Source: Annual Conference Statistics (Table 1)

Footnote: Membership categories from *General Minutes* distribution tables

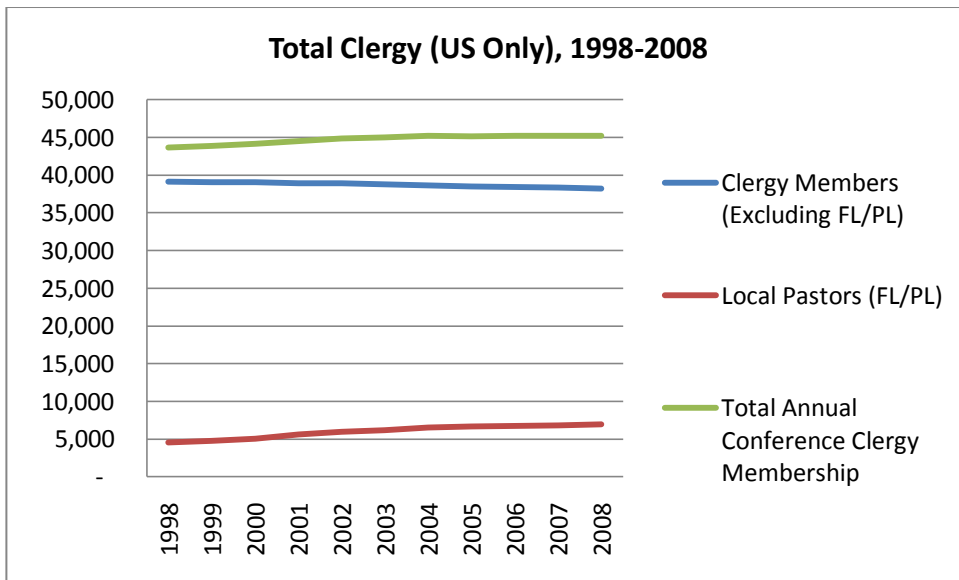


Source: Annual Conference Statistics (Table 1)

Footnote: Attendance categories from *General Minutes* distribution tables

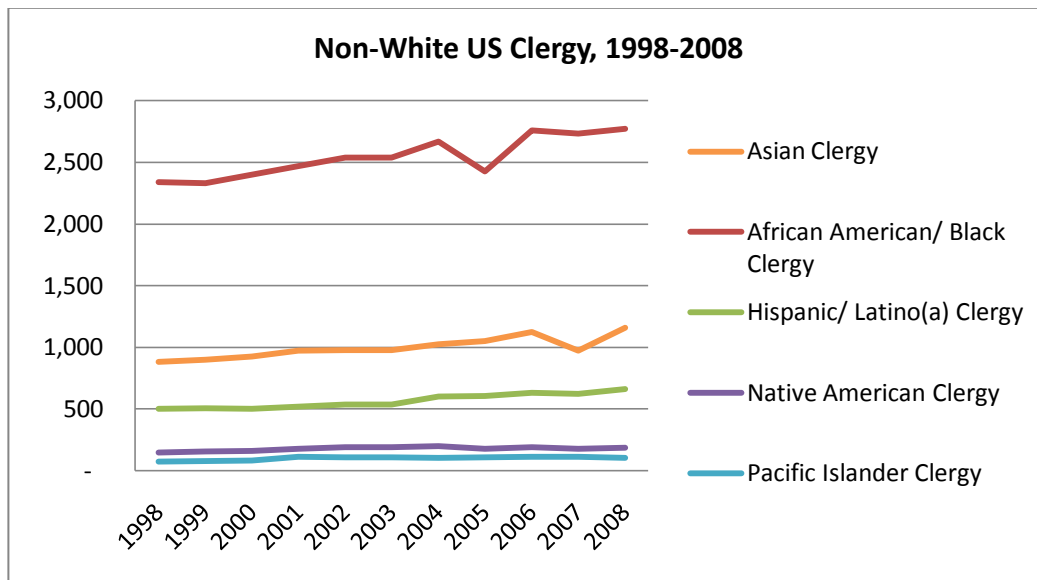
Clergy Trends

From 1998 to 2008, Annual Conference clergy membership has increased by 3%. Clergy members, excluding FL/PL, have declined by 2% and Local Pastors (FL/PL) have increased by 54%.



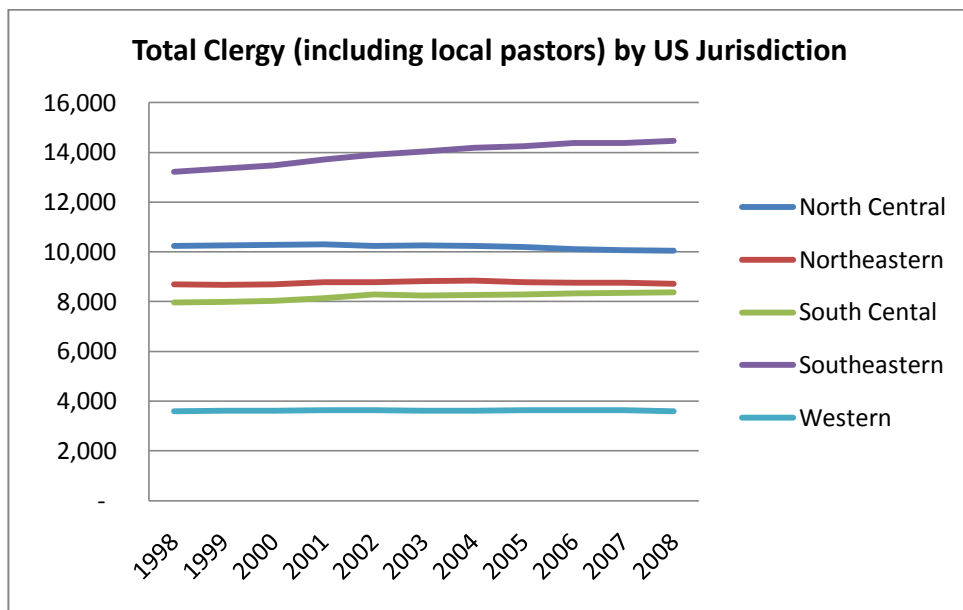
Sources: *General Minutes* Recapitulation Table 4 and *General Minutes* Central Conference Statistical Summary

Although there have been significant nominal percentage increases in diverse clergy racial/ethnic categories over the 1998 to 2008 period, the total clergy remain predominantly white (88%) and male (76%) in 2008.



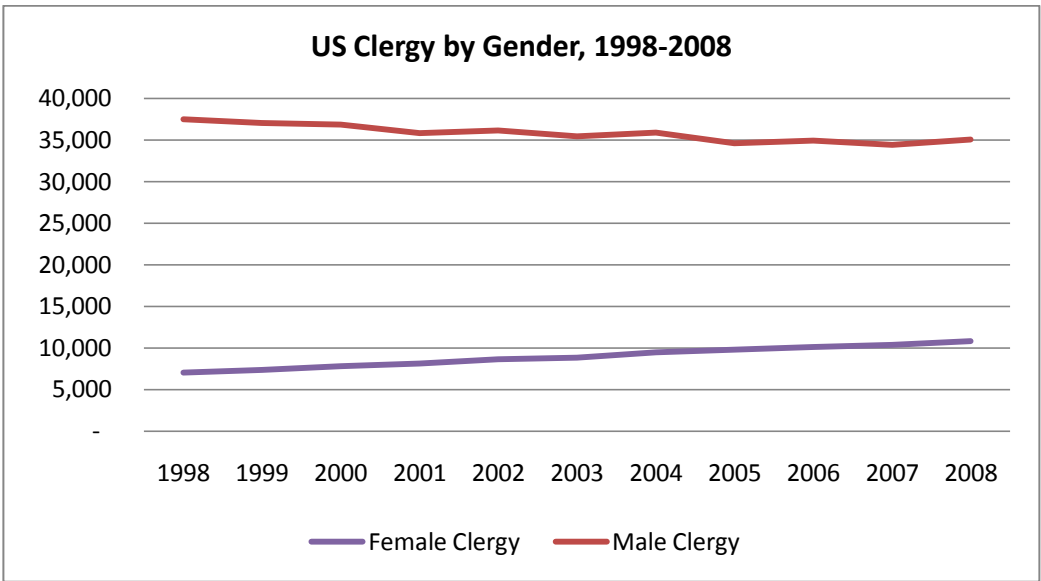
Source: Business of the Annual Conference reports

Clergy trends by US Jurisdiction from 1998 to 2008 were flat in the North Central and Western Jurisdictions. There were slight increases in the Northeastern and South Central Jurisdictions due to growth in Local Pastors (FL/PL). The Southeastern Jurisdiction saw growth in both total Clergy and Local Pastors (FL/PL).

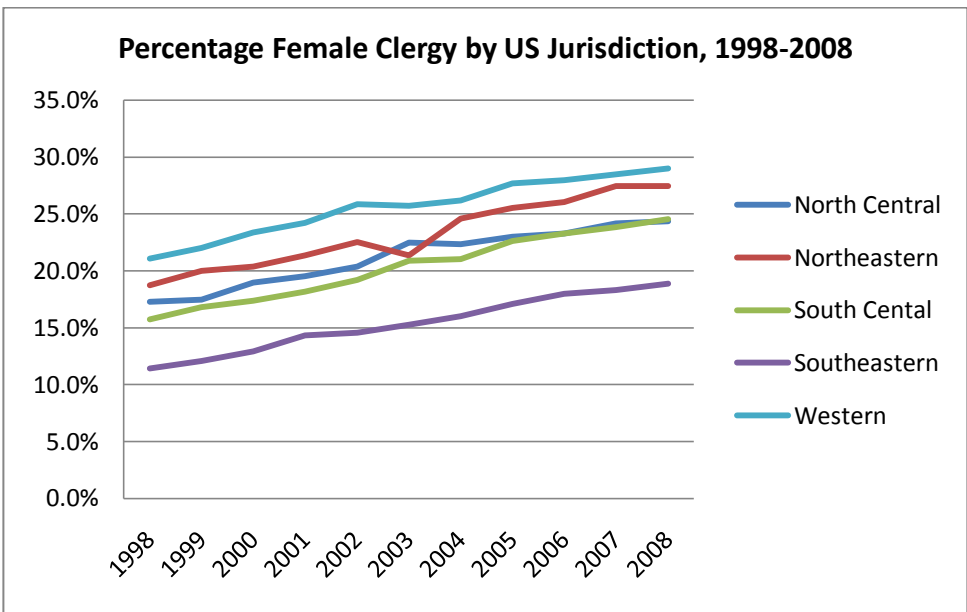


Source: General Minutes Recapitulation Table 4

Female clergy have been an increasing percentage of the clergy population from 1998 to 2008. This trend has occurred across all jurisdictions, but significant variation among jurisdictions remains in place.

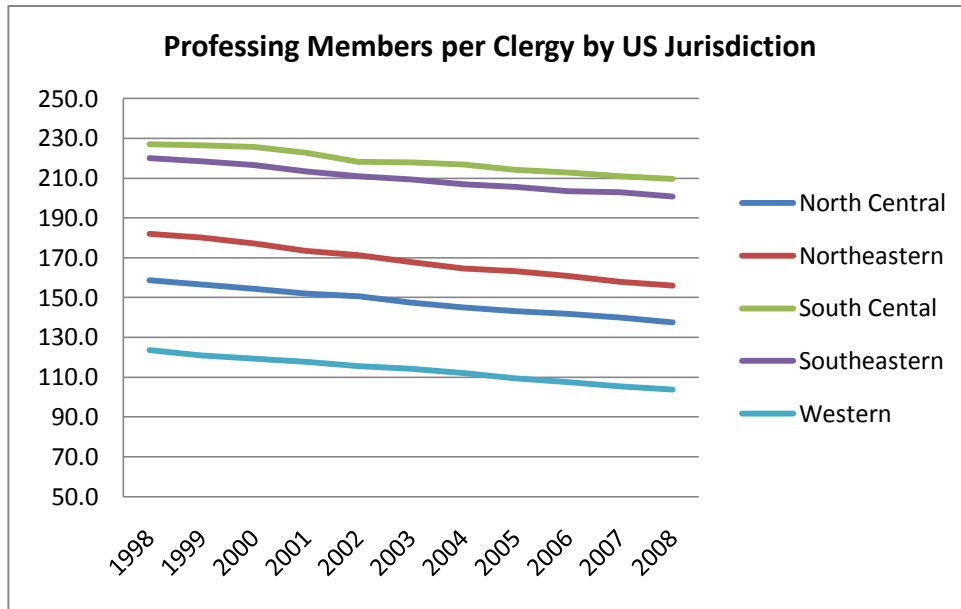


Source: Business of the Annual Conference reports

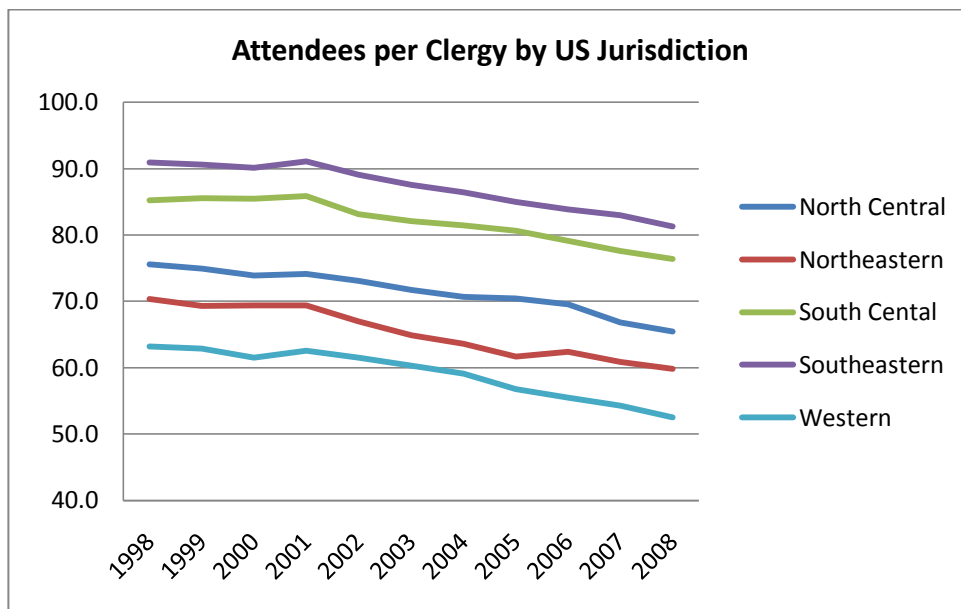


Source: Business of the Annual Conference reports

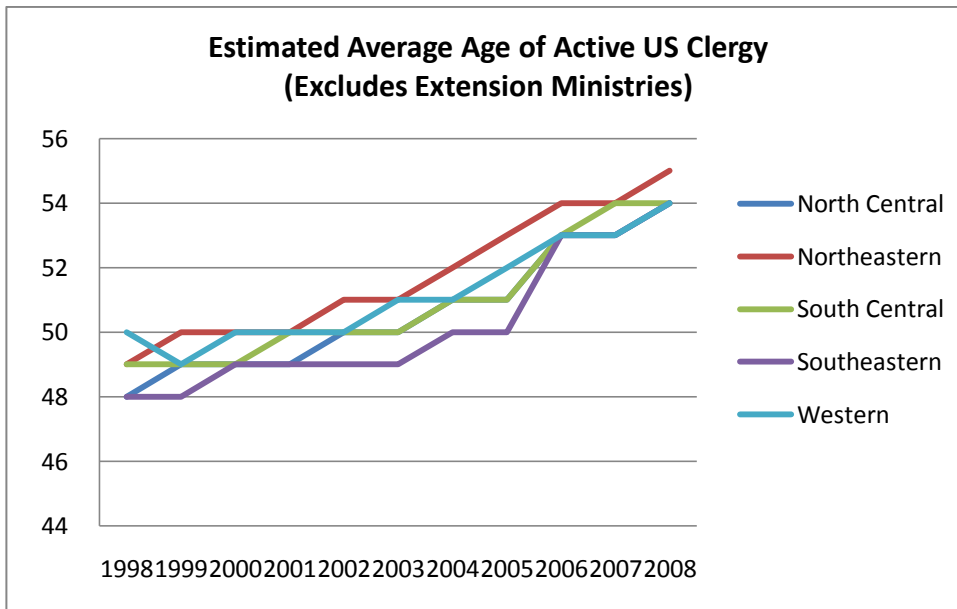
Professing members and attendees per clergy declined in all jurisdictions from 1998 to 2008.



Source: Business of the Annual Conference reports, Annual Conference Statistics (Table 1)



In 2008, average clergy age was estimated at 54.2 and has increased across all jurisdictions from a total average age of 48.8 in 1998.



Source: Pastor birthdates from General Board of Pensions and Health Benefits matched with GCFA pastor records

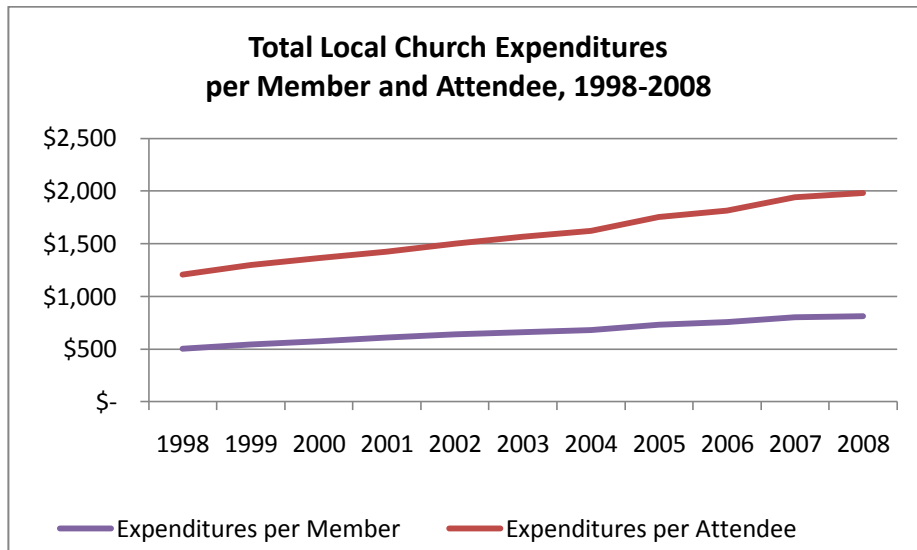
Footnote: GCFA does not have birthdate information for all pastors. Estimates are based on available data.

Financial Trends

Total Local Church Expenditure Trends

From 1998 to 2008 total Local Church Expenditures increased by 49%. On a per member and per attendee basis, expenditures increased by 61% and 64% respectively.

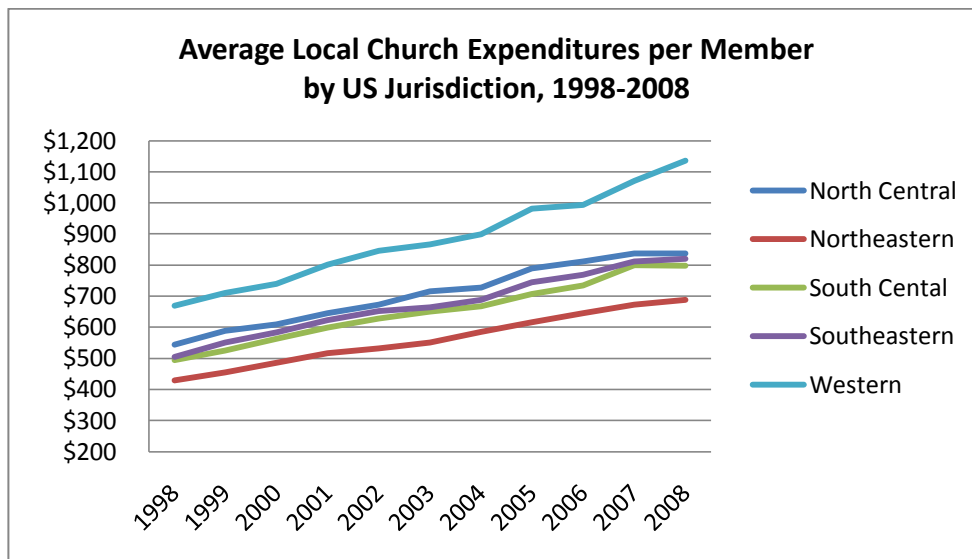
Corresponding giving data is not available for the 1998 to 2008 time period.



Source: Annual Conference Statistics (Tables 1-2)

Footnote: US only, Total Local Church Expenditures include all items reported on Table 2 including benevolences.

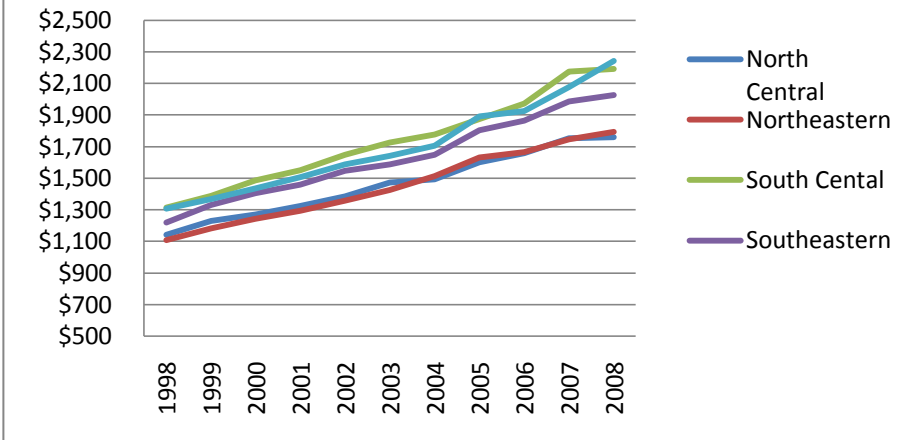
All Jurisdictions experienced increasing Average Local Church Expenditures per Member and Attendee throughout the 1998 to 2008 time period.



Source: Annual Conference Statistics (Tables 1-2)

Footnote: Nominal values, US only

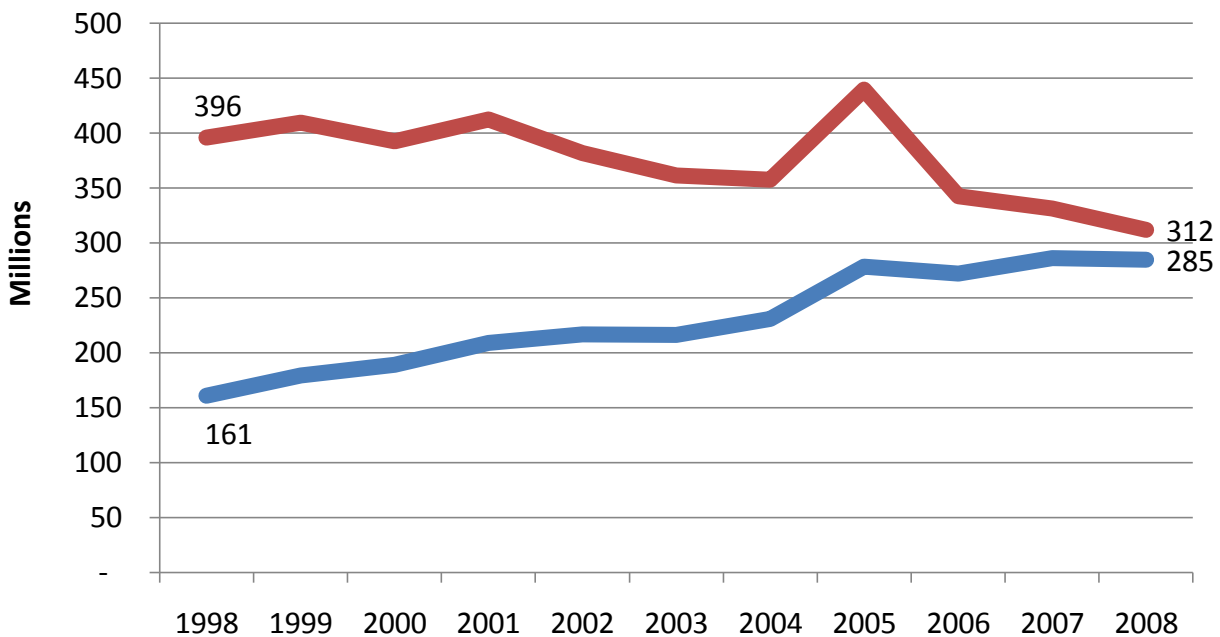
**Average Local Church Expenditures per Attendee
by US Jurisdiction, 1998-2008**



Source: Annual Conference Statistics
(Tables 1-2)
Footnote: Nominal values, US only

Local church benevolent spending data was available and the trends for the 1998 to 2008 period are shown in the chart below. While inflation adjusted benevolent spending from local churches forwarded to their Annual conferences declined by 22% over the period, other local benevolences increased by 77%.

Connectional Benevolences Sent to Conference Treasurer & Other Benevolences (adjusted for inflation)



Source: GCFA

Local Church Giving and Expenditure Profile – 2008

Although giving information at the local church level is not available for the period 1998 to 2008, information for 2008 itself is available as summarized in the table below.

Local Church Giving and Expenditures 2008	All reporting US churches	North Central	Northeastern	South Central	Southeastern	Western
Annual Operating Giving	\$ 5,552,913,731	\$ 960,285,483	\$ 796,542,613	\$ 1,188,572,612	\$ 2,253,982,700	\$ 353,530,323
Capital and Special Giving	\$ 943,988,412	\$ 180,979,880	\$ 126,844,726	\$ 250,493,635	\$ 334,169,073	\$ 51,501,098
Funding Outside Local Church	\$ 41,477,726	\$ 8,227,369	\$ 6,008,383	\$ 7,250,567	\$ 14,360,925	\$ 5,630,482
Total Income	\$ 6,538,379,869	\$ 1,149,492,732	\$ 929,395,722	\$ 1,446,316,814	\$ 2,602,512,698	\$ 410,661,903
Total Local Church Expenditures	\$ 6,221,970,986	\$ 1,141,668,038	\$ 921,875,116	\$ 1,396,777,785	\$ 2,359,238,225	\$ 402,411,822
Net	\$ 316,408,883	\$ 7,824,694	\$ 7,520,606	\$ 49,539,029	\$ 243,274,473	\$ 8,250,081

Source: Annual Conference Statistics (Table 3)

Footnote: US only, Income reporting reliable only for 2008. **Churches who reported no annual operating giving are excluded.**

This table can be viewed as a profile for funds flow at the local church level. As is shown, in 2008 approximately 77% and 16% of net funds flow came from the Southeastern and South Central Jurisdictions, respectively, for a total of 93%.

General Church Apportionment Trends

General Church Apportionment Funds Paid increased 24% from 1998 to 2008. This increase was driven by increases in World Service, Episcopal, General Administration and International Cooperation Funds. The remaining funds remained essentially flat for the period.

Fund contribution shifted primarily to the World Service and Episcopal Funds which together received 71% of General Church apportioned funds in 2008 – up 66% from 1998. Funds shifted primarily from Ministerial Education and Black College Funds, which together received 26% of funding in 1998 and 20% of funding in 2008.

GENERAL CHURCH PAID APPORTIONMENTS 1998 TO 2008					
	% Change 1998-2008	1998 % Total	1998 % Paid	2008 % Total	2008 % Paid
Total General Church Apportioned Funds Paid	24%	100%	89%	100%	86%
World Service	30%	53%	89%	56%	86%
Episcopal	43%	13%	93%	15%	89%
General Administration	62%	4%	87%	5%	85%
International Cooperation	36%	1%	86%	1%	85%
Ministerial Education	0%	17%	86%	13%	85%
Black College	2%	9%	85%	7%	85%
Africa University	0%	2%	88%	2%	90%

Source: GCFA

Estimated Local Church Expenditure Profile – 2008

Estimated Local Church Expenditure Profile - 2008 % Total Expenditures		
Clergy salary, benefits, & support costs	24.1%	33.6%
Lay staff	19.5%	
Maintenance, utilities, etc.	16.8%	35.9%
Buildings and improvements	10.4%	
Principal and interest	8.7%	
Apportionments and other benevolent giving	14.5%	19.8%
Program expenditures	5.3%	
Total	99.3%	

Based on the above estimates, local church expenditures are driven primarily by building related costs (36%) and staffing costs (34%) with apportionments, other benevolent giving, and program costs representing the lowest expenditure category (20%).

Estimated Total Local Church Indebtedness and Real Estate Holdings

Although it is not possible to construct a total Church balance sheet based on available information, we were able to obtain some qualified Local Church estimates from GCFA – qualified by concerns regarding reporting accuracy, consistency and reliability.

In 2008, Local Church assets at market value (including church and parsonage real estate holdings, furniture and other assets including investment securities) were estimated to have a total market value of approximately \$59 billion and total Local Church indebtedness was estimated at approximately \$4 billion (both in nominal dollars). These same estimated nominal figures in 1998 for Local Church assets and indebtedness were \$37 billion and \$2 billion, respectively.

Sustainability Advisory Group Findings

In addition to review of information reviewed previously, this report relies on recent findings produced by the Sustainability Advisory Group in their Final Report dated May, 2010. We recommend that this report be read in its entirety for its extensive findings and recommendations. We have summarized some of the findings relating to the Church's operating and financial environment below.

- The Report's fundamental conclusion is as follows. "The support structure of the U.S. Church has been precipitously turned on its head; we have fewer failing to support more. The Church simply cannot afford to support itself for much longer without drastic change."
- The Report focuses on many findings relating to the Church's clergy – an estimated surplus of 784 to 942 clergy, too many small churches operating with full time clergy, operating expense and funding challenges associated with clergy compensation and retirement and health benefits, the significant cost of supporting seminary education, and a range of clergy policy and process issues.
- The Report focuses on local church operating cost challenges – particularly in churches that are not growing – and raised the question of economy of scale in church attendance and ability to sustain the full operating costs of a local church.
- The Report cites concerns about local church indebtedness regarding decision making and future sustainability – annual principal and interest payments have increased from approximately \$400 million in 2000 to approximately \$600 million in 2007, representing an increase from over 8% to almost 12% of total local church expenditures.

APPENDIX B

THE UNITED METHODIST CHURCH OPERATIONS ASSESSMENT

INTERVIEW LIST AND PROTOCOL

COUNCIL OF BISHOPS INTERVIEW LIST*

Operations Assessment Project May, 2010

John Hopkins

Marcus Matthews

Charlene Kammerer

Alfred Gwinn

Lindsey Davis

Linda Lee

Warner Brown

Deb Kiesey

Jim Dorff

Patrick Streiff

Bruce Ough

Mike Watson

Sally Dyck

John Schol

Larry Goodpaster

Gregory Palmer

Mary Ann Swenson

Neil Irons

Joe Yeakel

Gaspar Domingos

Eben Nihwatiwa

Nkulu Ntambo

Joaquina Nhanala

Leo Soriano

Sharon Rader

Minerva Carcaño

Robert Fannin

Bill Hutchinson

Ernest Lyght

Mike Lowry

Roy Sano

Forrest Stith

Peter Weaver

James Swanson

Bill Oden

Grant Hagiya

Janice Huie

Hee-Soo Jung

Rosemarie Wenner

* Bolded individuals were unavailable.

INTERVIEW LIST*

The Operations Assessment Project May, 2010

<u>Interview</u>	<u># of Hours</u>	<u>Interview Set Up By</u>	<u>Person to be interviewed</u>	<u>Did Not Occur</u>
<u>Council of Bishops</u>	-	-	-	-
12 US Bishops (in 3 groups of 4 for 1.5 hrs each)	4.5			
3 global groups, 2 Bishops each, Africa, Europe, Philippines (for 1.5 hrs each)	4.5			
3 groups of Bishops who are also Agency Bd Presidents (for 1.5 hrs each)	4.5			
Outgoing President	1.5	BB	Greg Palmer	
Incoming President	1.5	BB	Larry Goodpaster	
<u>Connectional Table – Presiding Chair</u>	1.5	BB	Bishop John Hopkins	
<u>Judicial Council</u>	1.5	BB	Belton Joyner	
<u>Agency General Secretaries</u>				
GCFA	1.5	TG	Kumar, A. Moses Rathan (615) 329-3393 ext 2322	
GBCS	1.5	TG	Winkler, James 202-488-5620 or 202-550-9118	
GBOD	1.5	TG	Greenwaldt, Karen 877-899-2780 ext 7022	
GBGM	1.5	TG	Thomas Kemper 011-49-202-767-0190 *Thomas will be interviewing from Germany*	x
GBHEM	1.5	TG	Del Pino, Jerome King 615-340-7356	
GBPHB	1.5	TG	Boigegrain, Barbara A. 847-866-4200	
UMPH	1.5	TG	Alexander, Neil M. 615-749-6327	
GCAH	1.5	TG	Williams, Robert J. 973-408-3191	
GCCUIC	1.5	TG	Sidorak, Stephen J., Jr. 860-632-1641	
UMCOM	1.5	TG	Hollon, Larry 615-742-5410	
GCORR	1.5	TG	Hawkins, Erin 202-547-2271	

INTERVIEW LIST* con't

The Operations Assessment Project May, 2010

<u>Interview</u>	<u># of Hours</u>	<u>Interview Set Up By</u>	<u>Person to be interviewed</u>	<u>Did Not Occur</u>
GCUMM	1.5	TG	Hanke, Gilbert C. 615-620-7267	
General Conference	1.5	TG	Gere Reist 717-238-6739	
<u>Clergy Focus</u>				
Seminary Dean - Perkins	1	BB	Lawrence, William B.	
Seminary President - Asbury	1	BB	Tennet, Timothy C.	x
Seminary Presidents Iliff	1	BB	Trickett, David G.	
Bishop Al Guinn, Ministry Study Committee	1	BB	Bishop Al Gwinn	
Seminary President - Garrett Evangelical	1	BB	Phil Amerson	
<u>District Superintendents/Assts to Bishops</u>				
District Superintendents/Assistants to Bishops	1	BB	Sally Langford	x
District Superintendents/Assistants to Bishops	1	BB	Carl Frazier	
District Superintendents/Assistants to Bishops	1	BB	Bishop John Shoal	
Asssitant to Bishop	1	BB	Gary George	
<u>Annual Conference Leaders</u>				
Chair of Bd of Ordained Ministry	1	BB	Barrie Tritle	
Treasurer/CFO - North Carolina Conference	1	BB	Christine Dodson	x
Connectional Ministry Director - North Carolina Conf.	1	BB	Gary Keene	
Additional experienced leader	1	BB		
<u>Pastors</u>				
"Leading Edge" group of 100 pastor	1	BB	Adam Hamilton	x
Small church pastor (approx. 60 size) - Western Jurisd.	1	BB	Rich Lang	
Medium church pastor (approx. 250 size) - NE Jurisd.	1	BB	Evelyn McDonald	
<u>3 Active Lay Leaders</u>				
Active Lay Leader	1	BB	Mike McCurry	
Active Lay Leader - Texas Conference	1	BB	Leah Taylor	x
Active Lay Leader	1	BB	Tom Watson	
<u>3 Wise thinkers</u>				
Wise thinkers	1	BB	Lyle Schaller	
Wise thinkers	1	BB	Gil Rendle	
Wise thinkers	1	BB	Doug Anderson	

1. Context/Understanding

- What are the three or four most important macro trends, dynamics and/or circumstances that are affecting the Church?
- Are these trends broadly understood and how are they understood and recognized by the Church leadership and, more broadly, by general members and attendees. Please be specific about the Church leadership that you are referring to and to their specific roles in the context of your comments.

2. Change and Change Readiness

- How do you generally assess the need for change in response to the Church's changing environment?
- How do the Church leadership and, more broadly, the general membership/attendees assess the need for change? Please be specific about the Church leadership that you are referring to and to their specific roles in the context of your comments.
- How do you assess the willingness to lead and/or support change among Church leadership and, more broadly, the general membership/attendees? Relative low/high degrees? Please be specific about the Church leadership that you are referring to and to their specific roles in the context of your comments.
- Are there particular arenas for ministry or groups, formal or informal, who will be strongly supportive or resistant to change? If so, please identify.

3. Create a Vital Methodist/Wesleyan Connexion for the 21st Century

- Drawing on your historical, present and future view and understanding of the distinctive Methodist/Wesleyan connection, how would you define a vital connexion for the 21st Century?
- What are the core values of a vital Methodist/Wesleyan connexion for the 21st Century?
- What Church structures and processes contribute notably and positively to the strengthening of the connectional spirit?
- How do the Church's structures and processes frustrate the liberation and strengthening of the connectional spirit within the Church? Please be specific in describing.

4. Improve Decision Making, Implementation Effectiveness, and Accountability

- What is working and not working in the decision-making effectiveness of the Church's leadership and governance structures within the bodies and groups that make decisions?
 - General Church?
 - Jurisdiction /Central Conference?
 - Annual Conference?
 - Local Church/Charge?
- What is working and not working in (1) the effectiveness of major church decision-making and in (2) the subsequent implementation processes?
 - Strategic decision making in pursuing the Call to Action goals of “making Disciples of Jesus Christ for the transformation of the world” and “addressing the Four Areas of Focus”?
 - Funding and budget management processes?
 - Measurement of outcomes and accountability processes?
 - Communication processes?
 - Clergy recruitment, education /development and deployment processes?
 - Stewardship?
 - Collaboration?
 - Leadership development?
 - Conflict resolution?
- What Church structures, entities and/or processes should be evaluated for their efficacy and /or value-added contribution and why?
- Are there major areas of organizational/operational redundancy?
- Are there major areas or processes that either lack alignment or are misaligned?
- Does the Church function effectively as a global church? If so, how? If not, why?

5. Improve Affordability

- What are the major opportunities to improve affordability within the Church?
- Is there an understanding about whether and how large a gap exists between what the Church needs to do and what it can afford?
- What is the likely impact of maintaining the status quo in terms of financial policies and practices in the Church?

6. Leadership – How do you assess the overall capacities and competencies of Church leadership in terms of effective decision-making, implementation and accountability as opposed to structure/process? Please be specific about areas/groups and roles (not specific individuals) and the nature of the competency strengths and weaknesses.

7. Given your general assessment of the context, readiness for change, decision making, performance, affordability and leadership – if you could make no more than two changes, what would they be and why?

APPENDIX C

THE UNITED METHODIST CHURCH OPERATIONS ASSESSMENT SURVEY

The United Methodist Church Call to Action Operational Assessment Project Survey June, 2010

Survey Design and Purpose

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 and processes, both in general and in the context of "making disciples of Jesus Christ for the transformation of the world" and in the context of pursuing the Four Areas of Focus. The Survey was designed to complement an extensive formal interview process (referenced separately in this report) and independent analysis and review.

The Survey was directed at a broad group of Church leadership and the sample profile and response rate is reviewed below.

A summary of the Survey data is included at the end of this report.

Survey Sample Profile and Response Rate

Below is the summary of the survey sample profile and response rate. The survey completion rate was 88% (the percentage of respondents who completed the survey once it was started).

Response Rate By Church Role	Sample	Respondents	Response Rate	Percent of Respondents
Connectional Table	65	27	42%	6%
Bishops	160	59	37%	14%
GCFA	45	16	36%	4%
General Secretaries	14	8	57%	2%
Agency Treasurers	12	10	83%	2%
Board Officers of General Agencies	57	36	63%	9%
Judicial Council	11	6	55%	1%
Deans/Presidents of UM Seminaries	14	7	50%	2%
Directors of Connectional Ministries	62	29	47%	7%
Conference Treasurers	63	39	62%	9%
District Superintendents	461	173	38%	41%
CTA Steering Team	16	10	63%	2%
Total	924	423	46%	100%

NOTE: Column total of 924 was adjusted for 56 people in more than one role.

Summary of Survey Results

The following summary of survey results is organized and presented in the order of the original survey design. Survey respondents were asked to evaluate the specified survey parameter on a “1 to 5 scale” with 1 being “low” and 5 being “high”. For purposes of reviewing and summarizing the survey findings, we have grouped the responses in Below Average (1 and 2), Average (3) and Above Average (4 and 5). The mean responses are also referenced for many of the questions. Summary survey data tables are included at the end of this Appendix C.

Environmental Assessment

Survey respondents evaluated the following groups in the parameters of the environmental assessment: Bishops as individuals, The Council of Bishops as a collective entity, General Agency executives, General Agency Board and Commission members, Annual Conference leadership, pastors in local churches and lay leadership in local churches.

In terms of degree of understanding of the Church’s trends, dynamics and circumstances, all groups except lay leadership were thought to have an Average or Above Average understanding – Bishops as individuals and as a Council were thought to have the highest understanding with Bishops as individuals higher than the Council.

Belief in need for change showed a similar pattern with the difference that all groups were thought to have an Above Average belief in need for change with the exception of lay leadership which was Below Average – again Bishops as individuals and as a Council were thought to have the highest belief in need for change with Bishops as individuals higher than the Council.

Willingness to lead change was another parameter on which respondents were asked to rank the various groups. Bishops and individuals and as a Council were thought to have an Above Average willingness to lead change (individuals higher than Council) and Annual Conference leadership was considered to have an Above Average willingness to lead change. General Agency executives were rated Average and the remaining groups Below Average with lay leadership the lowest.

Likely resistance to change was thought to be highest (Above Average) among General Agency executives and governing members and lay leaders with pastors lower but still Above Average. Bishops as individuals and as a Council were considered to have likely resistance to change of Below Average.

Organization Structure and Process Assessment

The General Conference

The survey respondents evaluated the General Conference’s effectiveness in the context of the Church’s general legislative body as Below Average by over 50% of respondents across all areas of evaluation (effectiveness of decision making leading to best outcomes, process effectiveness in producing

legislation, , right balance between policy and administrative action and stewardship effectiveness in fulfilling its responsibility through the budget process and use of financial resources) except four year frequency of meeting effectiveness which received a 48% Below Average response rate.

The Jurisdictional/Central Conferences

In their roles as regional legislative decision-making bodies the Jurisdictional/Central Conferences were evaluated as Below Average across all categories: decision- making effectiveness, process effectiveness, four year meeting frequency effectiveness, role clarity and goal clarity. Over 50% of respondents evaluated role and goal clarity as Below Average. In the context of the ongoing administrative functions and roles of the Jurisdictional/Central Conferences, all categories were evaluated by more than 50% of respondents as Below Average (effectiveness of decision making, process and role/goal clarity).

The Judicial Council

The Judicial Council was evaluated as Average in conflict resolution effectiveness and Above Average in decision making and process effectiveness.

The General Church's Administrative Structure (COB, CT, GCFA, GBPHB, GCAH)

Respondents were asked to evaluate the General Church's Administrative Structure effectiveness as a collective group of entities (as specified above) on a range of effectiveness characteristics as applied separately to "making disciples of Jesus Christ for the transformation of the world" and the Four Areas of Focus. Decision-making effectiveness of the Church's Administrative Structure was evaluated as Below Average across all categories for both "making disciples..." and for the Four Areas of Focus – "making disciples..." had a consistently lower mean score than the Four Areas of Focus across all areas of evaluation. For "making disciples...", 60% or more of respondents ranked the effectiveness of the following categories Below Average: ability to resolve conflict, accountability for outcomes and competencies to deliver results for the first half of the 21st Century - 50% or more of respondents ranked these additional areas as Below Average: role clarity about who makes which decisions, ability to collaborate in making strategic decisions, ability to deliver results and ability to lead the effective and efficient use of financial and human resources. For the Four Areas of Focus, there were two categories in which 50% or more evaluated the category as Below Average: ability to resolve conflict and accountability for outcomes.

The General Church's Program and Ministry Functions (i.e., GBGM, GBOD, GBHEM, GBGS, UMCOM, GCUIC, GCRR, GCSRW, GCRR, GCSRW, GCUMM, UMPH)

Respondents were asked to evaluate the General Church's Program and Ministry Functions effectiveness as a collective group of entities (as specified above) on a range of effectiveness characteristics as applied separately to "making disciples of Jesus Christ for the transformation of the world" and the Four Areas of Focus. As for the Administrative Structure, decision-making effectiveness of the Church's Program and Ministry Functions was evaluated as Below Average across all categories for both "making disciples..." and for the Four Areas of Focus – "making disciples..." had a consistently lower mean score than the Four Areas of Focus across all areas of evaluation. In "making disciples...", the Program and Ministry Functions were evaluated by more than 60% of respondents as having Below Average accountability for outcomes – additional areas that were rated by 50% or more of respondents as Below

Average included: decision-making effectiveness, ability to collaborate on making strategic decisions, ability to deliver results, ability to resolve conflict, competencies to deliver results and ability to lead in the effective and efficient use of financial and human resources. As with the Administrative Structure, for the Four Areas of Focus there were two categories in which 50% or more evaluated the category as Below Average: ability to resolve conflict and accountability for outcomes.

Annual Conferences

Respondents were asked to evaluate Annual Conferences separately in their dual capacities as legislative and administrative bodies. In their administrative capacity, respondents were asked to evaluate the Annual Conferences both in general and in their pursuit of the missions of “making disciples...” and the Four Areas of Focus. In their legislative capacity, the Annual Conferences were generally evaluated as Above Average with only decision process effectiveness as Average. The only category in which more than 50% of respondents provided an Above Average evaluation was effectiveness of meeting once a year. The overall evaluation of the Annual Conferences in their administrative capacity was Average. For both “making disciples...” and the Four Areas of Focus, the Annual Conferences were Average in the degree that they are empowered to deliver the desired outcomes. In all other areas for both missions, the Annual Conferences were Below Average – for both missions, the Annual Conferences were evaluated by 50% or more of respondents to be Below Average in ability to resolve conflict and degree of implementation accountability.

Districts

Districts were also evaluated for their effectiveness in general and for both missions that were the focus of the survey. District evaluations were Below Average across all areas of evaluation. Also across all areas of evaluation, “making disciples...” was evaluated as higher than the Four Areas of Focus. Over 50% of respondents evaluated role clarity about who makes what decisions within the Districts as Below Average for the Four Areas of Focus and 50% or more of respondents evaluated degree of implementation accountability as Below Average for both missions.

Local Churches/Charges

Like Districts, Local Churches/Charges, “Local Churches”, were evaluated for their effectiveness in general and for both missions that were the focus of the survey. Overall decision making and process effectiveness was rated as Average for Local Churches. For “making disciples...”, role clarity and degree of empowerment to deliver results were rated Above Average and ability to resolve conflict and implementation accountability were rated Below Average – all other areas of evaluation for “making disciples...” were evaluated as Average. For the Four Areas of Focus, degree of empowerment to deliver results was rated Average while all other areas of evaluation were Below Average – more than 50% of respondents rated role clarity, ability to resolve conflict and degree of implementation accountability as Below Average.

THE UNITED METHODIST CHURCH CALL TO ACTION STEERING TEAM - OPERATIONAL ASSESSMENT PROJECT SURVEY MAY 2010

Please note that in the results Avg = Average; DK = Don't know; BA = Below average; AA = Above average.

ENVIRONMENTAL ASSESSMENT

Context/Understanding

1 Degree of Understanding of Macro Trends, Dynamics and Circumstances Affecting the Church

Total Respondents in Category - Avg	% of Total Respondents			
	DK	BA	Avg	AA
Bishops as Individuals	4	10	18	68
The Council of Bishops as a Collective Entity	8	16	24	52
General Agency Executives	7	25	27	41
General Agency/Board/Commission Members	9	28	37	26
Annual Conference Leadership	1	17	41	41
Pastors in Local Churches	0.8	29	45	24
Lay Leadership in Local Churches	0.5	61	25	14

Change and Change Readiness

1 Belief in Need for Change

Total Respondents in Category -	Avg
Bishops as Individuals	4.2
The Council of Bishops as a Collective Entity	3.94
General Agency Executives	3.36
General Agency/Board/Commission Members	3.18
Annual Conference Leadership	3.6
Pastors in Local Churches	3.34
Lay Leadership in Local Churches	2.89

% of Total Respondents			
DK	BA	Avg	AA
4	6	11	79
7	9	18	67
7	22	24	47
10	24	28	37
1	13	29	57
1	20	36	43
0.8	40	31	28

2 Willingness to Lead

Total Respondents in Category -	Avg
Bishops as Individuals	3.87
The Council of Bishops as a Collective Entity	3.59
General Agency Executives	2.98
General Agency/Board/Commission Members	2.79
Annual Conference Leadership	3.33
Pastors in Local Churches	2.89
Lay Leadership in Local Churches	2.44

% of Total Respondents			
DK	BA	Avg	AA
3	11	19	68
6	17	23	58
6	29	33	31
9	34	34	23
1	18	38	42
1	34	41	24
0.8	51	29	14

Change and Change Readiness (ctd.)

On a scale of 1 to 5 with 1 as "low" and 5 as "high", in the areas below please indicate your assessment of the need for change, willingness to lead change and likely resistance to change for each of the listed categories.

3 Likely Resistance to Change

Total Respondents in Category -	Avg
Bishops as Individuals	2.69
The Council of Bishops as a Collective Entity	2.9
General Agency Executives	3.5
General Agency/Board/Commission Members	3.48
Annual Conference Leadership	3.05
Pastors in Local Churches	3.32
Lay Leadership in Local Churches	3.53

% of Total Respondents			
DK	BA	Avg	AA
4	44	31	22
6	36	30	28
7	19	28	46
8	17	30	45
2	27	40	31
2	18	38	43
2	19	24	55

ORGANIZATIONAL STRUCTURE AND PROCESS ASSESSMENT

For the GENERAL CONFERENCE

- 1 **Decision-Making Effectiveness:** In the *context of its role as the Church's general legislative body*, please assess the effectiveness of the following decision-making areas (1 as "low" and 5 as "high)

Total Respondents in Category -	Avg
Overall Effectiveness of Decision Making - leads to best outcomes	2.49
Process Effectiveness - process of producing legislation	2.32
Effectiveness of Meeting Once Every Four Years	2.62
Decision Results Effectiveness - right balance between policy and administrative action	2.41

% of Total Respondents			
DK	BA	Avg	AA
2	51	32	15
3	56	28	13
3	48	24	25
5	52	31	12

- 2 **Affordability**

Total Respondents in Category -	Avg
General Conference Financial Stewardship Effectiveness in Fulfilling its Financial Responsibility through the Budget Process and Use of Financial Resources	2.47

% of Total Respondents			
DK	BA	Avg	AA
4	51	29	16

For the JURISDICTIONAL/CENTRAL CONFERENCES

- 1 Decision-Making Effectiveness: *In the context of their roles as regional legislative decision-making bodies, please assess the effectiveness of the following decision-making areas (1 as "low" and 5 as "high")***

Total Respondents in Category -	Avg
Overall Effectiveness of Decision Making - leads to best outcomes	2.48
Decision Process Effectiveness	2.47
Effectiveness of Meeting Once Every Four Years	2.67
To What Degree is Their Role Clear	2.51
To What Degree are Their Goals Clear	2.27

% of Total Respondents			
DK	BA	Avg	AA
8	48	28	16
8	47	29	16
7	43	29	24
6	51	20	23
7	58	19	16

- 2 Decision-Making Effectiveness: *In the context of the ongoing administrative/program functions and roles of the Jurisdictional/Central Conferences, please assess the effectiveness of the following decision-making areas (1 as "low" and 5 as "high")***

Total Respondents in Category -	Avg
Overall Effectiveness of Decision Making - leads to best outcomes	2.33
Decision Process Effectiveness	2.29
To What Degree is Their Role Clear	2.26
To What Degree are Their Goals Clear	2.13

% of Total Respondents			
DK	BA	Avg	AA
12	51	27	10
13	52	26	10
12	54	22	12
12	58	20	10

For the JUDICIAL COUNCIL

1 Decision-Making Effectiveness: *In the context of the role of the Judicial Council, please assess the effectiveness of the following decision-making areas (1 as "low" and 5 as "high")*

Total Respondents in Category -	Avg
Overall Effectiveness of Decision Making - leads to best outcomes	3.42
Decision Process Effectiveness	3.43
Conflict Resolution Effectiveness	3.03

% of Total Respondents			
DK	BA	Avg	AA
12	16	26	46
17	14	25	44
16	26	26	32

For the GENERAL CHURCH'S ADMINISTRATIVE STRUCTURE (i.e., COB, CT, GCFA, GBPFB, GCAH)

**MAKING
DISCIPLES**

**FOUR AREAS OF
FOCUS**

1 Decision-Making Effectiveness: *In the context of the General Church's overall administrative structure, please provide your assessment of the effectiveness of decision making in the following areas (1 as "low" and 5 as "high")*

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents			
			DK	BA	Avg	AA	DK	BA	Avg	AA
Role Clarity About Who Makes Which Decisions	2.54	2.9	5	51	23	21	8	34	28	30
Administrative Decision Making Effectiveness - leads to best outcomes	2.45	2.71	5	48	35	11	9	40	31	21
Decision-Making Competency - right competencies to make administrative decisions	2.65	2.78	7	39	35	20	9	36	32	23
Ability to Collaborate in Making Strategic Decisions	2.41	2.65	7	50	27	16	11	41	28	21

2 Effectiveness in Implementing Decisions: *For the General Church's overall administrative structure, please provide your assessment of the effectiveness of implementation in the following areas (1 as "low" and 5 as "high")*

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents			
			DK	BA	Avg	AA	DK	BA	Avg	AA
Authority - degree that entities are empowered to deliver desired outcomes	2.69	2.95	5	44	25	25	8	31	31	29
Ability to Deliver Results	2.36	2.55	4	57	24	14	8	45	29	17
Ability to Resolve Conflict	2.14	2.33	9	61	23	7	13	50	28	9
Accountability for Outcomes	2.12	2.39	4	65	18	11	9	54	21	16
Competencies to Deliver Results for the First Half of the 21st Century	2.25	2.54	6	60	24	10	9	47	26	19

3 Affordability: For the General Church's overall administrative structure, please provide your assessment of the following (1 as "low" and 5 as "high")

Total Respondents in Category -	MD Avg	FAF Avg
Ability to Lead the Effective and Efficient Use of Financial and Human Resources	2.35	2.58

% of Total Respondents				% of Total Respondents					
DK	BA	Avg	AA	DK	BA		Avg		AA
4	58	23	15	9	43		29		19

For the GENERAL CHURCH'S PROGRAM AND MINISTRY FUNCTIONS (i.e., GBGM, GBOD, GBHEM, GBCS, UMCOM, GCUJC, GCRR, GCSRW, GCUMM, UMPH)

**MAKING
DISCIPLES**

**FOUR AREAS OF
FOCUS**

1 Decision-Making Effectiveness: For the General Church's program and ministry functions, please provide your assessment of the effectiveness of decision making in the following areas (1 as "low" and 5 as "high")

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents							
			DK	BA	Avg	AA	DK	BA			Avg		AA	
Role Clarity About Who Makes Which Decisions in Program & Ministry Functions	2.53	2.89	8	48	28	16	9	33			31			26
Decision-Making Effectiveness - leads to best outcomes for program & ministry functions	2.39	2.65	8	52	30	10	10	40			33			17
Decision-Making Competency - right competencies to make program & ministry decisions	2.53	2.78	8	45	31	17	10	35			32			23
Ability to Collaborate on Making Strategic Decisions for the Program & Ministry Functions	2.31	2.6	9	54	27	10	11	42			31			17

2 Implementation Effectiveness: For the General Church's program and ministry functions, please provide your assessment of the effectiveness at implementation of the following areas (1 as "low" and 5 as "high")

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents			
			DK	BA	Avg	AA	DK	BA	Avg	AA
Authority - degree that entities are empowered to deliver desired program and ministry outcomes	2.71	2.92	7	42	29	23	8	34	28	30
Ability to Deliver Program and Ministry Results	2.42	2.64	5	53	29	13	8	42	32	18
Ability to Resolve Conflict within the Program and Ministry Functions	2.25	2.36	11	53	29	7	13	50	25	12
Accountability for Outcomes	2.09	2.34	6	65	21	8	8	57	21	15
Competencies to Deliver Results for the First Half of the 21st Century	2.3	2.58	7	56	26	11	9	45	29	18

MAKING DISCIPLES

FOUR AREAS OF FOCUS

3 Affordability: For the General Church's program and ministry functions, please provide your assessment of the following (1 as "low" and 5 as "high")

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents			
			DK	BA	Avg	AA	DK	BA	Avg	AA
Ability to Lead in the Effective and Efficient Use of Financial and Human Resources	2.34	2.57	6	55	26	13	9	44	30	17

For the CHURCH'S ANNUAL CONFERENCES

- 1 Decision-Making Effectiveness: *In the context of the Annual Conference roles as regional legislative decision-making bodies, please assess the effectiveness of the following decision-making areas (1 as "low" and 5 as "high")***

Total Respondents in Category -	Avg
Overall Effectiveness of Decision Making - leads to best outcomes	3.13
Decision Process Effectiveness	2.97
Effectiveness of Meeting Once Every Year	3.56
To What Degree is Their Role Clear	3.29
To What Degree are Their Goals Clear	3.11

% of Total Respondents			
DK	BA	Avg	AA
0.8	24	38	37
1	30	41	28
1	16	24	58
2	23	27	48
2	29	29	39

- 2 Overall Decision-Making Effectiveness: For the Annual Conferences as administrative boards/program work areas /committees, please provide your assessment of the effectiveness of overall decision making for following areas**

Total Respondents in Category -	Avg
Overall Decision-Making Effectiveness	2.93
Process/Board/Committees Effectiveness	2.79

% of Total Respondents			
DK	BA	Avg	AA
2	34	36	29
2	38	36	24

**For the CHURCH'S ANNUAL CONFERENCES
(con't.)**

In the context of their roles as administrative boards/program work areas/committees, please provide your assessment of the effectiveness (1 as "low" and 5 as "high") of the Annual Conferences in the following areas in general where indicated and also where indicated in pursuing the mission of "making disciples" and in addressing the "Four Areas of Focus".

**MAKING
DISCIPLES**

**FOUR AREAS OF
FOCUS**

- * **3 Decision-Making Effectiveness: For the Annual Conferences as administrative boards/program work areas/com- please provide your assessment of the effectiveness of decision making in the following areas (1 as "low" and**

Note: Discrepancy in language with results: results say deliberative legislative bodies.

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents							
			DK	BA	Avg	AA	DK	BA		Avg		AA		
Role Clarity About Who Makes Which Decisions within the Annual Conferences	2.98	2.67	2	32	33	32	6	46			26			23
Overall Effectiveness of Decision Making - leads to best outcomes	2.77	2.66	2	37	39	22	6	43			31			20
Decision-Making Competency - right competencies to make decisions	2.8	2.72	2	38	38	22	7	42			30			22
Ability to Collaborate in Making Strategic Decisions within the Annual Conferences	2.88	2.73	2	34	37	27	6	42			29			23

- * 4 **Implementation Effectiveness: For the Annual Conferences as administrative boards/program work areas/committees, please provide your assessment of the effectiveness of implementation in the following areas (1 as "low" and 5 as "high")**

Note: Discrepancy in language with results: results omit mention of implementation.

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents			
			DK	BA	Avg	AA	DK	BA	Avg	AA
Authority - degree that entity is empowered to deliver desired outcomes	2.94	2.89	3	32	35	30	6	35	31	28
Ability to Deliver Results	2.57	2.61	3	46	35	16	7	45	31	17
Ability to Resolve Conflict within Annual Conferences	2.5	2.46	3	51	31	15	7	50	30	13
Degree of Implementation Accountability for Outcomes	2.46	2.44	3	54	27	16	7	53	25	15

- 5 **Affordability: For the Annual Conferences as administrative boards/program work areas/committees, please provide your assessment of the following (1 as "low" and 5 as "high")**

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents			
			DK	BA	Avg	AA	DK	BA	Avg	AA
Ability to Lead the Effective and Efficient Use of Financial and Human Resources	2.71	2.72	3	41	35	21	7	40	25	22

For the DISTRICTS

- 1 Overall Decision-Making Effectiveness: For the Districts please provide your assessment of the overall effectiveness of decision making in the following areas (1 as "low" and 5 as "high")**

Total Respondents in Category -	Avg
Overall Effectiveness of Decision Making - leads to best outcomes	2.79
Process Effectiveness	2.74

% of Total Respondents			
DK	BA	Avg	AA
4	37	33	26
5	38	23	24

**MAKING
DISCIPLES**

**FOUR AREAS OF
FOCUS**

- 2 Decision-Making Effectiveness: For the Districts please provide your assessment of the effectiveness of decision making in the following areas (1 as "low" and 5 as "high")**

Total Respondents in Category -	MD Avg	FAF Avg
Role Clarity About Who Makes Which Decisions within the Districts	2.68	2.36
Effectiveness of Decision Making - leads to best outcomes	2.64	2.42
Decision-Making Competency - right competencies to make decisions	2.68	2.51
Ability to Collaborate in Making Strategic Decisions within the Districts	2.74	2.57

% of Total Respondents				% of Total Respondents							
DK	BA	Avg	AA	DK	BA			Avg			AA
6	42	29	24	9	53			22			16
6	42	31	21	10	49			27			14
6	40	34	20	10	45			27			18
6	40	26	28	10	43			27			20

3 Implementation Effectiveness: For the Districts, please provide your assessment of the effectiveness of implementation in the following areas (1 as "low" and 5 as "high")

Total Respondents in Category -	MD Avg	FAF Avg
Authority - degree that entity is empowered to deliver desired outcomes	2.81	2.61
Ability to Deliver Results	2.64	2.48
Ability to Resolve Conflict within the Districts	2.78	2.53
Degree of Implementation Accountability for Outcomes	2.52	2.3

% of Total Respondents				% of Total Respondents			
DK	BA	Avg	AA	DK	BA	Avg	AA
6	40	24	30	10	43	25	22
6	44	30	21	10	46	29	16
6	37	30	27	11	42	29	18
6	50	25	19	10	55	22	13

MAKING DISCIPLES

FOUR AREAS OF FOCUS

4 Affordability: For the Districts, please provide your assessment of the following (1 as "low" and 5 as "high")

Total Respondents in Category -	MD Avg	FAF Avg
Ability to Lead the Effective and Efficient Use of Financial and Human Resources	2.79	2.59

% of Total Respondents				% of Total Respondents			
DK	BA	Avg	AA	DK	BA	Avg	AA
6	39	29	27	10	42	30	19

For the LOCAL CHURCHES/CHARGES

1 Overall Decision-Making Effectiveness: For the Local Churches/Charges please provide your assessment of the overall effectiveness of decision making in the following areas (1 as "low" and 5 as "high")

Total Respondents in Category -	Avg
Overall Effectiveness of Decision Making - leads to best outcomes	3.17
Process Effectiveness	3.01

% of Total Respondents			
DK	BA	Avg	AA
1	22	40	37
1	27	42	30

MAKING DISCIPLES

FOUR AREAS OF FOCUS

2 Decision-Making Effectiveness: For the Local Churches/Charges please provide your assessment of the effectiveness of decision making in the following areas (1 as "low" and 5 as "high")

Total Respondents in Category -	MD Avg	FAF Avg
Role Clarity About Who Makes Which Decisions within the Local Churches/Charges	3.33	2.35
Effectiveness of Decision Making - leads to best outcomes	2.98	2.59
Decision-Making Competency - right competencies to make decisions	2.9	2.58
Ability to Collaborate in Making Strategic Decisions within the Local Churches/Charges	2.94	2.61

% of Total Respondents				% of Total Respondents							
DK	BA	Avg	AA	DK	BA			Avg			AA
0.5	25	29	46	4	55			25			16
1	31	40	28	6	43			35			17
1	33	40	26	5	43			35			17
1	32	38	28	5	46			29			20

3 Implementation Effectiveness: For the Local Churches/Charges, please provide your assessment of the effectiveness of implementation in the following areas (1 as "low" and 5 as "high")

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents			
			DK	BA	Avg	AA	DK	BA	Avg	AA
Authority - degree that entity is empowered to deliver desired outcomes	3.61	2.97	1	14	28	57	5	34	28	33
Ability to Deliver Results	2.97	2.74	0.8	32	37	30	5	42	29	24
Ability to Resolve Conflict w/in Local Churches/Charges	2.59	2.37	5	46	35	15	8	52	30	10
Degree of Implementation Accountability for Outcomes	2.7	2.42	1	45	32	22	5	54	26	15

MAKING DISCIPLES

FOUR AREAS OF FOCUS

4 Affordability

Total Respondents in Category -	MD Avg	FAF Avg	% of Total Respondents				% of Total Respondents			
			DK	BA	Avg	AA	DK	BA	Avg	AA
Ability to Lead the Effective and Efficient Use of Financial and Human Resources	3	2.73	2	30	38	30	5	40	30	24

APPENDIX D

THE UNITED METHODIST CHURCH CONSTITUENT ORGANIZATIONS ROLE AND GOVERNANCE STRUCTURE

<u>BODY</u>	<u>PRIMARY RESPONSIBILITY</u>	<u># MEM</u>	<u>COMPOSITION/SELECTION</u>	<u>MTG FREQ</u>
GENERAL CONFERENCE	Legislative Branch Governs church membership Governs powers & duties of elders thru local pastors Governs powers & duties of ACs, MCs, CCs, CMs Defines powers & duties of episcopacy Authorizes hymnal & book of worship Provides judicial system & procedures Initiates & directs all connectional enterprises Enacts legislation for operation of church Speaks officially for UMC	600 - 1000	Chair is Bishop in Presiding Role Half Clergy/Half Lay Elected by Annual Conferences Representation based on two factor basis: both number of clergy & number of church members Every AC entitled to at least one clergy & one lay delegate Bishops present but no vote Secretary, nominated by CofB	1x per 4 years
COUNCIL OF BISHOPS	Executive Branch Elects president for 2 yr term Bishops are superintendants of the entire church Carries out rules, regulations, & responsibilities set forth by GC Promotes temporal and spiritual interests of Church Individual Bishops preside over ACs and CCs Helps set direction of church and its mission	69A 90R	All active & retired bishops Bishops are elected clergy Elected for life	Semi-Annually

<u>BODY</u>	<u>PRIMARY RESPONSIBILITY</u>	<u># MEM</u>	<u>COMPOSITION/SELECTION</u>	<u>MTG FREQ</u>
CONNECTIONAL TABLE	Coordinates total program of Church Coordinates mission, ministry and resources of TUMC Articulates TUMC vision	47	21 Elected from JC & 7 from CC Clergy & Lay General Agency General Secretaries Member from Caucuses	N/A (Not Available)
JUDICIAL COUNCIL	Judicial Branch Interprets church law Determines constitutionality of proceedings at all levels of church life	9	Elected by General Conference	2x per year

GENERAL AGENCY BOARDS, COUNCILS & COMMISSIONS

<u>BODY</u>	<u>PRIMARY RESPONSIBILITY</u>	<u># MEM</u>	<u>COMPOSITION/SELECTION</u>	<u>MTG FREQ</u>
GENERAL COUNCIL ON FINANCE AND ADMINISTRATION	Coordinates & administers UMC finances Safeguards legal interests and rights Elects general sec who is also treasurer Prepares quadrennial budget for entire UMC Requires periodic audit of all agencies receiving funds from it Accountable for the financial plan of the Church	40	Elected quadrennially by GC 4 bishops 30 from jurisdictions, nominated by CofB from "Inclusive membership" * See Footnote 6 members at large	1x per year
GENERAL BOARD OF CHURCH AND SOCIETY	Implements social principles made by GC Analyzes long-range social trends Actions related to social justice Social-action & public-policy agency	63	"Inclusive membership"* 6 CC members, named by COB JCs elect members from nominations by AC with: 7 from NC; 8 from NE; 11 from SC; 12 from SE; 3 from W 6 episcopal members named by CofB Additional members to ensure inclusivity and expertise	N/A

GENERAL BOARD OF DISCIPLESHIP	<p>Focuses primarily on local church Helps congregations win converts</p> <p>Nurtures spiritual life</p> <p>Oversees Christian education</p>	58	<p>"Inclusive membership"* 6 bishops, named by COB JCs elect members from nominations by AC with: 6 from NC; 7 from NE; 10 from SC; 11 from SE; 2 from W** CC members named by CofB 6 episcopal members named by CofB 3 members selected from Division of Ministries with Young People Additional members to ensure inclusivity and expertise</p>	N/A
GENERAL BOARD OF GLOBAL MINISTRIES	<p>Enables congregations & ACs to participate in mission activity</p> <p>Recruits, sends, receives missionaries</p>	89	<p>Elected by JCs, nominated by ACs with: 7 from NC; 7 from NE; 9 from SC; 8 from SE; 4 from W** One Half Women 7 members from CCs 5 additional from CCs</p>	N/A

GENERAL AGENCY BOARDS, COUNCILS & COMMISSIONS con't

<u>BODY</u>	<u>PRIMARY RESPONSIBILITY</u>	<u># MEM</u>	<u>COMPOSITION/SELECTION</u>	<u>MTG FREQ</u>
GENERAL BOARD OF PENSION & HEALTH BENEFITS	Serves clergy, lay employees & their families thru retirement & other benefit programs Provides medical coverage program, tax deferred annuities and death benefits Seeks assistance of other boards & agencies to establish benefits system for Central Conf. pastors	32	2 bishops elected by CofB 16 elected by JCs, nominated by ACs 6 elected by GC, nominated by CofB 8 members to ensure inclusivity and expertise	N/A
GENERAL COMMISSION ON ARCHIVES & HISTORY	Cares for historical interests of UMC Responsible for archival materials Maintains archives & libraries Makes recommendations to GC re: all national historic sites & heritage landmarks	24	10 elected by GC, nominated by CofB 2 bishops 5 presidents of jurisdictional commissions on archives and history 7 members at large elected by the commission 2 members from CC, inc. 1 bishop	N/A
GENERAL COMMISSION ON CHRISTIAN UNITY & INTERRELIGIOUS CONCERNS	Develops & interprets primary relationship of church to ecumenical & interreligious orgs and other churches Works toward unity & greater understanding w/in UMC	40	22 elected by JCs, nominated with: 5 from NC; 4 from NE; 6 from SC; 5 from SE; 2 from W** 9 members at large 4 bishops 1 from CC, elected by CofB	N/A

BODY	PRIMARY RESPONSIBILITY	# MEM	COMPOSITION/SELECTION	MTG FREQ
GENERAL COMMISSION COMMUNICATION	Provides communication programs & services Connects congregations News service Website	28	3 bishops 16 elected by JCs with: 3 from NC, 3 from NE, 4 from SC, 4 from SE, & 2 from W** 2 from CCs named by CofB 7 elected by the commission To ensure expertise in com.	N/A
GENERAL COMMISSION RELIGION AND RACE	Strives to ensure inclusiveness Assists ACs Administers Minority Group Self-Determination Fund	43	3 bishops 27 elected by JCs with: 5 from NC, 7 from NE, 6 from SC, 6 from SE, & 3 from W** 1 from CC named by CofB 12 elected by the GCOR&R	N/A
GENERAL COMMISSION THE STATUS & ROLE OF WOMEN	Advocates for women w/in church Develops policies & strategies re: sexism Develops guidelines for language	43	Majority are women 8 elected by the commission President is woman 3 bishops 2 from CCs, named by CofB "Inclusive membership"*	N/A
GENERAL COMMISSION UM MEN	Prepares male leaders Clearinghouse on related issues at local, district & conf. levels	25	2 bishops 5 jurisdictional presidents of UMM 6 elected by NACPUMM 2 from CCs, named by CofB 6 members at large Pres of UMM Foundation Pres of NAUM Scouters	N/A

UM PUBLISHING HOUSE	<p>Operates publishing, dist, retail establishment Self-sustaining</p> <p>Can buy property & build w/out clearance from Connectional Table and GCFA</p>	43	<p>3 bishops 8 elected by UMPH Board 30 elected by JCs with: 6 from NC; 6 from NE; 7 from SC; 9 from SE; 2 from W** 2 Young Adults 2 from Central Conferences</p>	N/A
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CONFERENCES

<u>BODY</u>	<u>PRIMARY RESPONSIBILITY</u>	<u># MEM</u>	<u>COMPOSITION/SELECTION</u>	<u>MTG FREQ</u>
GENERAL CONFERENCE	See above			
JURISDICTIONAL CONFERENCES	Elects bishops Elects general agency board members Regional bodies based on geography 5 in US Has right to carry on the program of the Church w/in the jurisdiction Has right to determine boundaries of the ACs Right to appoint Committee on Appeals	Varie s	Equal number of lay & clergy Elected by ACs	1x per year
<i>COLLEGE OF BISHOPS</i>	<i>Grouping of all bishops within each JC</i>	Varie s		
<i>COMMITTEE ON EPISCOPACY</i>	<i>Accountable to Committee on Episcopacy of JC</i>	Varie s		
CENTRAL CONFERENCES	Perform same functions as JCs except that they are outside US Have larger measure of freedom to adapt to needs of their location and work out their own structures	Varie s	Half Clergy/Half Lay elected by Acs	Meets within the year suc- ceeding GC

BODY	PRIMARY RESPONSIBILITY	# MEM	COMPOSITION/SELECTION	MTG FREQ
ANNUAL CONFERENCES	Legislative and administrative body Vote on constitutional amendments - two-thirds vote required for passage Elect lay and clergy delegates to GC Have right to determine all matters concerning ordination, character, and conference relations of clergy Inquire into financial deficits & membership problems Functions thru large # of boards & agencies Primary "connector" of local churches	50+	Clergy members Conference leaders Lay leaders District leaders Each pastoral charges elects one lay member	1x per year

ANNUAL CONFERENCE - MANDATED BODIES

<u>BODY</u>	<u>PRIMARY RESPONSIBILITY</u>	<u># MEM</u>	<u>COMPOSITION/SELECTION</u>	<u>MTG FREQ</u>
BOARD OF ORDAINED MINISTRY	Board in each annual conference Responsible for clergypersons from first interest to retirement Recruits people for ministry Screens and tests candidates Administers scholarships and other funds of MEF Develops continuing education programs	N/A	Clergy members 1/5th to 1/3rd laity Bishop nominates members	N/A
DISTRICT COMMITTEE ON ORDAINED MINISTRY	Assists Board of Ordained Ministry	11+	6+ ordained clergy from district Rep from BofOM 3 lay members DS	N/A
COMMITTEE ON DISTRICT SUPERINTENDANCY	Supports DS in oversight of spiritual and temporal affairs of the Church, with special reference to the district	11	District lay leader 2 appointed by DS Remainder - 2 clergy, 2 laymen, 2 laywomen, 2 members at large "Inclusive membership"*	1x per year or more

BODY	PRIMARY RESPONSIBILITY	# MEM	COMPOSITION/SELECTION	MTG FREQ
DISTRICT BOARD OF CHURCH LOCATION AND BUILDING	Members elected annually for 3 year term Investigate all proposed local church building sites Consider recommendations of district strategy committee for parish development, one exists Seek ways to provide continuity of service in parishes where there is a change in racial, ethnic,, or cultural character Investigate all proposed and existing buildings for energy efficiency	6 - 9	District Supervisor Members nominated by DS in consultation with district nominating committee, if one exists Elected annually by AC "Inclusive membership"*	N/A
PROVISIONAL ANNUAL CONFERENCES	Usually takes place on a mission field where the general growth in the scope of the work warrants it	10+	N/A	N/A
MISSIONARY CONFERENCE	GBofGM guides these Functions like a district conference	N/A	N/A	N/A
DISTRICT CONFERENCES	Optional structure Votes on issuing certificates of candidacy Lacks much authority; not widely used 40 - 80 churches in each district Each district has full-time superintendant Administrative program oversight of churches in district	N/A	AC specifies, giving attention to inclusiveness	N/A

<u>BODY</u>	<u>PRIMARY RESPONSIBILITY</u>	<u># MEM</u>	<u>COMPOSITION/SELECTION</u>	<u>MTG FREQ</u>
CHARGE CONFERENCES	<p>Every church member votes to help elect lay members to Annual Conference, who then vote to elect lay delegates to JC, CC, GC</p> <p>Governs each local church</p> <p>General oversight of church council (LCs & Charges)</p> <p>Connecting link between LC and TUMC</p> <p>Presided over by DS</p> <p>Sets pastor's salary</p> <p>Interpret \$\$ apportioned to church for World Service and conference benevolences</p>	Varies	<p>Mirrors Church Council</p> <p>Can also have retired clergy & retired diaconical ministers</p> <p>DS presides</p> <p>*Elected by themselves</p>	<p>1x per year</p> <p>Can be called into special sessions</p>
CHURCH COUNCIL	<p>Month to month governing body</p> <p>Final authority over budget</p> <p>Administrative agency of the Charge Conference</p> <p>Size is determined by Charge Conference</p>	Varies (12 - 50)	<p>Elected officers</p> <p>Reps of nurturing, outreach, & witness ministries</p> <p>Chairs of key committees</p> <p>Pastor</p> <p>Lay leaders</p>	<p>Quarterly or more freq.</p>

<u>BODY</u>	<u>PRIMARY RESPONSIBILITY</u>	<u># MEM</u>	<u>COMPOSITION/SELECTION</u>	<u>MTG FREQ</u>
LOCAL CHURCHES	Continuing & extending Jesus Christ's ministry & outreaching love Part of a district 3 mandatory committees: 1. Nominations & leadership development 2. Pastor-parish relations 3. Finance	N/A	Lay leader	N/A

NOTES

N/A denotes not available.

*Inclusive membership denotes the following categories: clergy, laywomen, laymen, racial and ethnic minority, youth and young adult, older adult, and people with disabilities. The goal for membership is that it be made up of one-third laywomen, one-third laymen, and one-third clergy; that it ensure adequate representation of youth , young adults, older adults, people with disabilities, and persons from small membership churches; and that it have at least 30 percent of the total be racial and ethnic persons.

** NC = North Central; NE = Northeastern; SC = South Central; SE = Southeastern; W = Western.

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