

Work Group 5 --Structure, Organization and Financial Considerations
Report to the called session of the Western Jurisdictional Conference, UMC
July 17, 2021

Who was on the team?

Bishop Elaine Stanovsky, Laurie Day, Monalisa Tuitahi and Paul Cosgrove comprise the initial quartet. Additional diverse team members will be recruited for their expertise, seeking involvement from those who have a deep institutional understanding and those who bring creative and outside-the-box thinking.

What were the beginning questions?

This work group was asked to explore the structure, organization and financial considerations of our life together moving forward within the Western Jurisdiction. The initial questions the Mission Cabinet gave to focus the group's work include:

- What is essential? What is nice to have? What is no longer needed?
- How can we be more creative on who oversees specific things and cluster leadership?
- How do we staff/resource the jurisdiction?
- How can we be more adaptive?

What process was used to gather information/have conversations?

The staff assigned to convene Work Group 5 recruited two leaders. This small quartet agreed to wait to recruit the team until after the other four groups reported to the special jurisdictional conference on July 17, 2021. These team reports are intended to prime the jurisdictional conference to discern values, mission focus and strategy focus for the Western Jurisdiction. Following the jurisdictional conference, the full team will convene to do its work. Based upon the reflection and deliberation of the jurisdictional conference, the group will propose ways to structure, organize and finance the jurisdiction to support and promote its emergent values, mission and strategy. The work group will report its work and recommendations to the anticipated November 13, 2021 session of the jurisdictional conference.

With its work largely happening after the July 17 called Western Jurisdictional Conference, Group 5 was asked to provide immediate information to aid delegates as they consider how many bishops are needed in the West and various funding alternatives for bishops and their offices. The Group 5 quartet developed several alternative scenarios to research and compare. Mark Bateman and Diane Knudsen, of the Western Jurisdiction Council on Finance and Administration, offered to project comparative financial implications for 5 scenarios to

demonstrate how each scenarios might affect general, jurisdictional and annual conference obligations for the costs of bishops. This report, linked below, constitutes the group's learnings to date.

What are the key learnings?

The significant learnings from Work Group 5 are yet to come and dependent on outcomes from Work Groups 1-4 and discussions during the special jurisdictional conference on July 17, 2021.

The preliminary work by the episcopal oversight work group in the Western Jurisdiction surfaced several questions about the financial implications that different scenarios of episcopal oversight might create. The Western Jurisdiction Council on Finance and Administration was asked to research and project financial implications of five possible scenarios. [A description of the 5 scenarios considered is attached here.](#) The initial results of the 5 scenarios research resulted in [the attached scenarios analysis](#) and more detailed information about possible scenarios can be researched in the future if delegates would find it helpful.

What critical questions arose for the group at this point in the process?

The initial work of the other four work groups directly impacts how Work Group 5 will develop structure, organization and financial proposals for consideration by the jurisdiction. Work Group 5 asked the other four groups to identify structure, organization and finance questions that arose during their work, which are summarized below. The work of the other four work groups and the jurisdictional conference's response to it shapes and directs the design work of Group 5, which will present its recommendations to the special session of the Western Jurisdiction in November 2021.

Based on the initial sharing from the other work groups the following questions arose for Work Group 5, regarding the structure, organization and finances of the Western Jurisdiction.

Mission Statement

- Where we put money shows what is important to us. Does the current budget reflect the emerging vision and mission of the jurisdiction? What would a budget look like that reflects our vision/mission? What values are revealed in where we are putting money?

The Role of the Episcopacy

- If the role of laity is strengthened, how might this affect the role of the bishop?

Episcopal Assignments and Plan of Supervision

- What if the general church only funds 4 bishops for the Western Jurisdiction?
 - Does the Western Jurisdiction have the *capacity* to fund a 5th bishop?
 - Does the Western Jurisdiction have the *authority* to elect a 5th bishop without General Conference approval?
 - Could *each* Area in the jurisdiction fund its own bishop?

- If finances reduce the bishops to 4 and the jurisdiction does not redraw the conference or area boundaries, is it possible to keep 5 Areas, served by 4 bishops?

Boundaries and Permeable Boundaries

- If the jurisdiction identifies its values, mission and priorities, they will lead us to strategy. How might we structure and organize our work to support the strategy?
- What are some different and more intentional ways of collaborating and sharing resources across conference boundaries?
- It might be more about how we function than about creating a new structure. How might we learn and choose to work differently, without needing to change the structure?
- Is it possible that our organization could encourage leadership to spontaneously emerge from local leaders with a passion in an area and become a leadership network that leads work in their area of call for the whole jurisdiction?
 - How could the jurisdiction recognize, embrace and undergird this kind of local initiative to affect the whole jurisdiction?
- How do we work collaboratively to share what a bishop or area does well across conference or area boundaries?

Recommendation for continued work. Where does this work need to go from here?

The initial work of the other four work groups shapes and directs Group 5's structural, organizational and financial design work. Leaders of Work Group 5 realize that all 5 work groups have significant work yet ahead. Only when work groups 1-4 develop specific recommendations for the values, mission, and strategy that will set the direction of the jurisdiction, will Group 5 know what it is striving to structure, organize and finance *for*. Then it will develop recommendations to embody the mission, live out the values and implement the strategies of the jurisdiction, and present them to a jurisdictional conference for consideration, adoption and implementation.