

WJ Workgroup on Structure, Organization, and Financial Considerations

Report to the Western Jurisdictional Conference

Our Team

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Our Task

This workgroup was asked to explore the structural, organizational, and financial considerations of our life together moving forward within the Western Jurisdiction (WJ) of The United Methodist Church. To accomplish this task, we sought to glean from responses to the workgroup reports to the special called Western Jurisdictional Conference on July 17, 2021, and emerging visions for the WJ. We also aspired to project structural, organizational and financial proposals for achieving each of these visions. We now offer these findings to the delegates, who may compare, critique and decide which, if any, of the visions and proposals to carry forward and what strategies to employ to do so.

A Conversation about Values

In pursuing our task, we found it necessary to have a conversation about values. We asked the question, "What are the values that should undergird the structural, organizational and financial proposals that we bring forward?"

Inclusion, love, justice, faith, and diversity emerged as the top values of United Methodists in the Western Jurisdiction according to polling conducted in 2021 and the report submitted by the Mission Statement workgroup. These are universal markers of the

Christian faith that the WJ is called to live out in this historical moment. To do so, we needed to identify further values that will guide our specific work.

Living into the shared values in the WJ entails a willingness to honestly assess the ways our structure, organization and finances have worked against inclusion, love, justice, faith and diversity. It also necessitates identifying practical and actionable values that will determine how we structure, organize, and finance our work in the WJ, to be accountable to our shared values. As such, this workgroup offers four practical values to undergird our work that will lead the WJ toward its shared values.

Practical Values that Undergird our Work

Inclusion - committing to the practice of authentically incorporating the presence, wisdom, and experiences of all people in all aspects of church life, especially historically excluded people*, as we seek to be beloved community together.

Contextualization - centering the local church and local ministries as the main disciple-making body of the church and relying on local expertise to guide mission and ministry.

Connectionalism - creating collaborative relationships that bridge the work of the church between every level of the denomination and beyond.

Decolonization - acting to shift power, dismantle systems of harm, make reparations, and build beloved community. Since colonialism affects all people, this requires internal work as well as an institutional process. Colonialism impacts indigenous, Black and other people of color, in addition to immigrants, migrants, refugees, women, and other historically excluded groups. We recognize that colonialism is intersectional, and so decolonization must be as well.

* **Historically excluded people** - people who have been unrepresented, under-represented, or purposefully excluded in all levels of the church institution, including but not limited to Black, indigenous, and other people of color (BIPOC), LGBTQIA+, people living in poverty, people with disabilities, and women.

We offer this [linked Values Rubric](#) to guide a developmental approach to evaluating our personal and institutional progress toward these practices in all parts of church life. We offer it as a mechanism to assess our proposals on structure, organization and finance, hoping that it can be adapted for use with other proposals and recommendations coming

to the WJ. It could also be adapted for assessing other areas of our life together, such as worship and nominations, for example.

A Conversation about Principles of Structure and Organization

The Western Jurisdiction is committed to structuring our life together in ways that are grounded in foundational elements of our heritage, embracing a new vision and practices to lead us into a future God is calling us toward. To begin this conversation, we name some familiar and defining structural elements that we do not want to lose as we live into the future. We do this by identifying principles of structure that are consistent with our values. This is not an exhaustive set of principles, but a limited one intended to ground our process in some core beliefs and aspirations.

Some may infer that they are intended to constrain the innovation and change that so many desire at this time. We do not see them as limiting our opportunity to experiment or discover new ways of being God's church. These principles have been born out of a variety of broad-based conversations and work underway across the WJ to imagine a new structure, including the WJ Fresh Methodism Summit in November of 2019, the Team of Ten, individual annual conference dream/vision teams, WJ delegations and others. The following principles are a framework on which we will need to be much more specific. It is the specificity that will allow us to flesh out our new approaches and new ways of expressing these principles.

Foundational Principles for the Structure of the Western Jurisdiction

We will be connectional in our polity. Connectionalism is a primary principle of how we will live out our values. It acknowledges that we are always stronger together. We seek primary and subordinate structures that increase the connectedness of people, churches, and annual conferences within the WJ, and to the extent we can, we seek to also increase the connection of the WJ to the rest of The United Methodist Church.

We will be episcopal. We view the episcopal nature of our organization as a primary way in which we live out our connectedness. While we recognize that a congregational structure is the best way of living out their mission for some denominations, congregationalism is not our path. We also believe that a dynamic, evolving episcopal structure provides opportunities to push ourselves in new, prophetic directions that enhance diversity in ways that might not otherwise occur.

(The workgroup notes that reaffirmation of our episcopal structure does not mean that the roles and responsibilities of bishops should remain static.)

We are a conferencing people. The planning of our ministry and life together will take place through conferencing—church conferences, annual conferences, jurisdictional conferences, and general conferences. All are different expressions of our connectional nature.

The local church and local ministries are the center of ministry. All our efforts and structures will be with an eye to whether they improve or hamper the ability of local congregations and ministry settings to engage in vibrant ministry.

We will strive to dismantle systems of harm and place authority, accountability, and responsibility at the appropriate level. We do not seek to be bureaucratic in structure; we seek to be innovative, experimental, and effective in ministry to utilize our resources best. This requires shifting and sharing power, particularly away from dominant culture people and practices and to historically excluded people by dismantling oppressive structures and creating avenues of liberation.

We will be inclusive. We will be God's beloved community, inclusive of all people. Within our structures, we will be led by people with diverse backgrounds so that we may more fully embrace and understand God's world.

A Conversation about Staff Configuration and Collaboration

We took the review of the current staff configuration within the Western Jurisdiction seriously and looked for possibilities of collaboration and alignment. We offer here a summary of our findings from the interviews and take-aways from those findings. Later we offer some recommendations for staff configurations and possible collaboration.

Interviews

Value: Collaboration calls for examining how regional leaders could transform into cross-conference teams and how the episcopacy could shift from a regional focus toward more jurisdictional collaboration.

Process: Our workgroup named that when we talk about changing the staff configuration and episcopal responsibilities, we sometimes make decisions without input from our episcopal leaders. Just as ministry in local settings is ministry "with"

rather than ministry "to," connectionalism within the institution should also be "with" rather than "to." Just as ministry in local settings is ministry "with" rather than ministry "to," connectionalism within the institution should also be "with" rather than "to." A sub-group discerned four questions about collaboration and position (varied by audience) and sent them out to active bishops and selected conference staff.

Results: All five active bishops responded to interview questions by email, and several directors of connectional ministries and conference staff responded to live interviews or emailed questions. The work now moves to interviewing bishops outside of the WJ who are living out collaborative leadership roles or presiding over areas of comparable size.

Take-Aways

Convergences:

- ❖ Casting a vision of collaboration across annual conference lines requires significant relationship-building, episcopal support, and clarity on administrative details. Each annual conference has to give support while also not laying claim to particular staff or programs.
- ❖ There were multiple mentions of new faith communities/church planting being a WJ-wide endeavor, as well as disaster-response/VIM missions, and some administrative areas (human resources, communications, finance administration, etc.).
- ❖ There was broad agreement on collaborations on specialized, technical aspects of the episcopacy (for example, sharing WJ-wide complaints and legal responses).

Divergences:

- ❖ Laity and clergy have named in other workgroups (and this one) ways we could rethink, divide or specialize the episcopacy. However, several bishops reported concern at this possible shift in the episcopacy and shared multiple examples of collaborations already happening.
- ❖ Some respondents emphasized the need to form collaborative teams over program areas while keeping administrative areas local and closer to the ground. In contrast, others emphasized the benefits of a cross-conference "business office" that could be smaller and more specialized to assist all the conferences.

A Conversation about Financing Ministry in the Western Jurisdiction

Our conversation about financing ministry and related data collection and review allowed us to appreciate a more accurate account of our financial realities in the Western Jurisdiction.

Guiding Queries

These leading queries about the assets of the jurisdiction and their allocation guided our conversation.

Episcopal Funding: What capacity exists in the conferences of the jurisdiction to self-fund episcopal leadership? E.g., If funding from the general church decreased to cover only three or four bishops, could we fund the gap to maintain five bishops? What if we determined six bishops were necessary to move forward the vision of the West? Could we financially support that? How?

Assets for Innovation, Big Picture Ministry, Expansion of Funding Models: Are there ministry opportunities we could take on more successfully as a jurisdiction utilizing shared/pooled assets? E.g., Could we address the lack of affordable housing throughout the West with a mix of liquid assets set aside for innovation, fallow property, and collaborative ministry, centering the voices of persons that a colonial history of property has most impacted? Could we do this in a financially sustainable way (i.e., income from a sustainable model that did not rely on tithing or giving to exist.)?

Local Church Revitalization: What funds are available for revitalization models that could be tried across the jurisdiction? E.g., Could each conference have 1-2 pastors testing a new circuit-riding model who then formed a jurisdictional cohort of others doing the same in their conference?

Collaborative Jurisdictional Staffing: Are there places in conference staffing that could be combined across the jurisdiction to bring more consistency, collaboration and efficiency? E.g., Could staffing in communications, human resources, or other administrative functions be shared for greater efficiency?

Unfunded Liabilities: If the WJ determined that to respond to God's call it was necessary to leave the denomination, what unfunded liabilities exist, and what resources exist to cover them by individual conferences or for each other?

Data Gathering and Analysis

The group analyzed conference financial strengths, assets, opportunities, and liabilities across the Western Jurisdiction. The annual conferences provided audited financial statements and additional supporting materials to assist in this work. Jurisdictional and general church financial information were also utilized. The [linked Financial Snapshot of Western Jurisdiction Conferences](#) provides a snapshot of financial trends, resources and culture among the annual conferences. The [linked Western Jurisdiction Financial Statements](#) provide information about the financial status of the WJ.

We acknowledge that budgets and financial statements typically communicate in the language of economic systems, which are tied to concepts of ownership derived from colonialism and capitalism. Reviewers strived to be attentive to how these systems are operating and creating oppressive hierarchies and exclusions and instead sought to identify mutually healing and liberating potentials.

Key Take-Aways

A review of the financial data resulted in the following key take-aways.

- ❖ Finances should not be considered a constraint as the WJ listens for God's voice in its next chapter of life and ministry. There are adequate financial resources in terms of cash and investments, as well as property held currently and property expected to be returned to the conferences in the next 10 years through closures.
- ❖ Though there is a narrative in the denomination that the WJ is a financial drag on general church finances, the data does not support this.
- ❖ There would likely be the capacity to fund additional episcopal costs or collaborative WJ innovation.
- ❖ The WJ is not incorporated and does not have an administrative infrastructure. This is a detail, not a constraint.

Structural and Organizational Proposals to Explore

Based on the above, we offer several examples of structural and organizational changes for delegates to consider as they develop legislation to lead the jurisdiction into the future. There are many more ideas that others could explore as delegates consider what is needed most to support our work together.

We hope that all that precedes will inform the continuing efforts of the jurisdiction and its delegates as they consider proposals and possibly create legislation for consideration at a future Western Jurisdictional Conference Session.

In the following, we offer examples of proposals that could assist the WJ to align its structure and organization to the stated values and principles. Most example proposals include brief descriptions of what the proposal intends to do and why, how the proposal relates to the values and principles identified in this report, and finally, a short notation of what next steps would be needed.

The workgroup did not agree or recommend all of these proposals, and some of this work is incomplete. Individual members of the workgroup offered some of these proposals, and not all workgroup members vetted or agreed to them. Each of the following proposals had support from at least one member of the workgroup and so remains included here for delegates to use in their discernment.

Example Proposals of Organizational Change

- ❖ Create smaller districts within annual conferences across the WJ. Each district superintendent (DS) could then serve as part-time DS and part-time local church pastor.
 - Smaller districts would spread out the leadership of DSs to include a larger and more diverse group. DSs would serve as leaders of their district (or circuit) and also in the local church or ministry, therefore grounding their leadership in the local context and preventing hierarchical leanings.
 - This small structural change would address and implement the values of contextualization (centering local ministries instead of the conference hierarchy); inclusivity (providing an avenue for wider inclusivity and diversity of leaders); and decolonization (moving from current top-down approach to intentionally position formerly excluded persons in influential roles).
 - **Next Steps:** Write a resolution for consideration by the jurisdictional conference requesting discussion and action by individual annual conferences to develop a team to identify a study process and submit a proposal for consideration by their 2022 annual conference session.

- ❖ Create circuits (groupings) of churches, geographically or programmatically connected, served by teams of clergy.

- Some conferences have created circuits for ministry. This proposal seeks to connect most local arenas of ministry into circuits. A circuit of churches brings together clergy and lay leaders to work in teams rather than in isolation. It values collaboration and the additional gifts provided by the circuit team. It spreads the financial and programmatic needs across a wider group of people (e.g., one financial administrator or one youth group across the circuit).
 - The values and principles lifted by this change include contextualization (either geographically or programmatically); connectionalism (collaborating across the circuit to prevent silos of ministry and instead, bringing together a variety of ministries to work together); inclusion (broadening the base of leaders across demographics); decolonization (returning to a more organic sharing of power and resources as experienced by pre-colonized communities); and conferencing (conferencing will occur within circuits as well as other areas).
 - **Next Steps:** Write a resolution for consideration by the jurisdictional conference requesting discussion and action by individual annual conferences to develop a team to identify a study process and submit a proposal for consideration by their 2022 annual conference session.
- ❖ Establish mechanism, expectation, and practice for collaborative, cross-conference teams to actively function across the jurisdiction.
- Some ministry areas currently operate and collaborate across annual conference lines and still other ministries could benefit from this shared expertise and collaboration. Volunteers lead many of these ministries and might just need to be connected and given permission to work together across conference lines. In some situations, this might include shifting staff from conference-based to jurisdiction-based and working for all (or some) conferences.
 - This structural change will address the following values and principles: connectionalism (deeper connections and collaborations across conference lines); conferencing (alignment of staff will enable a greater degree of conferencing within the entire WJ).
 - **Next Steps:** Convene conversations of like-positioned staff and key conference leaders across the jurisdiction to imagine what additional collaborative, cross-conference teams could look like; identify topic areas, and make recommendations for implementation. There might be some areas that require annual conference action, but many will need buy-in from leaders.

- ❖ Formally examine the possibilities of (1) appointing bishops within the jurisdiction to functional roles rather than geographic, all-encompassing roles, and (2) reassigning episcopal administrative and programmatic responsibilities to others, primarily laity, selected for their subject matter expertise, and primarily at the conference, district or circuit level.
 - The combined workgroup on the episcopacy and the WJ Episcopacy Committee have engaged in this initial exploration. Their work and findings should guide consideration of this proposal.
 - **Next Steps:** Review the report and work of the combined workgroup on the Episcopacy and explore if this task could be assigned to the WJ Episcopacy Committee or if it needs to be assigned to a different group that would formally report back to Western Jurisdiction Conference delegates by October 2022.

- ❖ Schedule all annual conference sessions within the WJ to be held on the same date, with shared program content in addition to individual conference business sessions.
 - Conferencing simultaneously, with shared program content, allows all annual conference sessions to learn, vision, and plan together while also individually attending to their own business. Collaborative work, in real-time, can enable the alignment of priorities and activities, as well as commitments to move forward in ministry together. The Mountain Sky and Greater Northwest Episcopal Areas have experience hosting multiple annual conferences simultaneously and can offer their learnings.
 - The strongest expressed value of this proposal will be connectionalism as conferences will collaborate for their futures together.
 - **Next Steps:** Write a resolution for consideration by the jurisdictional conference to develop a team to identify a study process and formally request the College of Bishops collaborate to seek a common time to hold all annual conferences.

- ❖ Restructure the membership and purpose of the Jurisdictional Leadership Team (JLT). Expand the membership to broaden representation to include people historically excluded from participation in the church institution and delegates identified as leaders by their annual conference. Revise the purpose of the JLT to be the primary body for carrying out the jurisdiction's work and implementing the jurisdictional conference's decisions.

- A strengthened and empowered JLT will enhance collaboration across the jurisdiction, facilitate resource sharing (including staffing) across conference lines, and focus shared resources to assist local ministries. Using technology to gather frequently throughout the year will enable jurisdiction-wide work between sessions of the Western Jurisdictional Conferences to be implemented by the JLT. An effective JLT will allow bishops to focus on the essentials of their general superintending for the local, jurisdictional, and global contexts. The restructured JLT will also narrow the scope of the Jurisdictional Mission Cabinet (JMC).
 - This organizational change will honor the value of connectionalism (strengthening collaboration between annual conferences and other groups within the WJ); inclusion (centering voices and leadership from historically excluded people and increasing representation from all conferences); and decolonization (by shifting power at the decision-making table).
 - **Next Steps:** The Western Jurisdictional Conference Rules of Order and Plan of Organization outline the membership and purpose of the JLT (Article XIII) and JMC (Article XVIII.d). Proposals for rule changes need to be submitted to the Rules Chairperson by March 1 of the year the Jurisdictional Conference occurs.
- ❖ Redraw annual conference boundaries to establish smaller conferences so that decision-making is made on a more localized basis with greater input/participation by local church leadership.
- Smaller-sized annual conferences can provide a stronger sense of connection between local ministry settings and the annual conference, allowing decision-making and resources to be based more locally. Smaller, geographically overlapping annual conferences can enable churches with similar missional needs to be grouped together so each conference can contextualize its work based on missional needs. Permeable boundaries would allow clergy to move between annual conferences as needed and share many of the resources presently provided by annual conferences on a jurisdiction-wide basis. (This model is present in the Philippines Central Conference.)
 - This proposal includes the values of connectionalism (collaboration between annual conferences) and contextualization (increased focus on local expertise).
 - **Next Steps:** Establish a task force to study how the Philippines Central Conference organizes itself and if it might serve as a guide for the WJ to explore ways to establish annual conferences based on missional similarities.

Redrawing of annual conference boundaries would require action of a future jurisdictional conference.

Continuing the Work

We realize this work is not complete and earnestly hope these efforts do not end here. The task of this workgroup was to explore issues related to the Western Jurisdiction's structure and organization, and to review related financial considerations. Our work builds on that of various other groups over the past several years, all striving to discern how our jurisdiction can best align its operations to its values and priorities. Now this task is given to the delegates of the Western Jurisdictional Conference for further exploration and action.

The special called Western Jurisdictional Conference in July 2021 asked that open forums be held so that the learnings from this and the other workgroups can be discussed and more people have an opportunity for their ideas to be added to the conversation. Additionally, the Jurisdictional Conference decided that representatives from each delegation will now be responsible for coalescing the work into proposals in the form of legislation. We offer our work to the delegates for their continued exploration and action

Finally, we end where we started. We hope that inclusion, love, justice, faith, diversity, as well as the practical values and foundational principles we have named, will guide your discernment and exploration. Our task of exploring the WJ's structure, organization, and finance is ultimately about seeking beloved community. Such a task is sacred work, and legislation may not always be the best way forward, but we hope that these values will keep all of us moving on to perfection.