NEW ENGLAND CONFERENCE
THE UNITED METHODIST CHURCH

Strategic Plan

UPDATED June 2017
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Introduction

STEPPING IN

‘When you see the ark of the covenant of the LORD your God being carried by the Levitical priests then you shall set out from your place. Follow it, so that you may know the way you should go, for you have not passed this way before.’  
(Joshua 3:3b-4a)

With these dramatic words, Joshua prepared people born in the wilderness to enact God’s plan into being. They needed to learn how to make their next steps into new steps, since even the surface beneath their feet would be changing from the familiar sand of the wilderness to the cold water of a riverbed that marked their perceived limit of potential options. And greater unknown obstacles of impossibility were still in their future yet.

Lest the conjuring up of this Biblical memory feel too heroic for our moment as the New England Annual Conference of the United Methodist Church, the Strategic Planning Team affirms that, as the quotation above shows, in the middle of these would-be saints was the ark of the covenant -- the central promises of God from which all living hope emanates.

As the people of God we are not the heroes of our own story. The faithfulness of the living God is our guide and our hope. There is no plan, strategy or analysis that will ever lead us better than the story of our liberating and life-giving God. When United Methodists gather to discern a future in faith, we have no other choice but to be guided by the Biblical witness we believe. For the Strategic Planning Team, the image of Joshua preaching to God’s people at the shore of the Jordan constantly inspired and challenged us.

We were also lifted up by a story of Jesus making his disciples go ahead of him to the water’s other side.

But when [Peter] noticed the strong wind, he became frightened, and beginning to sink, he cried out, “Lord, save me!” (Matthew 14: 30)

When we step into new water, or step out of the boat we are on, or step up to new possibilities, we know that we will face strong wind, long nights, desperate fear, painful failure and, most importantly of all, the bold witness of Jesus that raises us up.

With a faith such as this, which it is always our duty and joy to share with the world, the Strategic Planning Team has attempted to model the very priorities we believe God is offering to us by trusting in
1. vibrant **spirituality** that centers and motivates us,
2. commitment to **effective leadership**, and
3. strong **relationships and connection** built on listening and time spent together.

From the beginning of our work, such an approach meant that we would not spend a majority of time engaging in the all too familiar committee wordsmithing of statements and definitions. Nor would we be filling binders with words of the moment that would be forgotten on shelves long before the next committee was tapped to rewrite them. The 2012 Annual Conference gave our committee an enormous responsibility that could effectively have required the complete reconfiguration of every aspect of United Methodism in New England in just one year. We have been encouraged that the potential area for change could be so expansive. And we have heard from many people a spirit of permissive risk-taking and newness even as we have often experienced the familiar institutional stodginess as it became time to turn next steps into new steps.

There is nothing unfaithful about being realistic, and reality has certainly been with us in our work as well. For example, the composition of our team has very much been in transition since our first meeting in Fall of 2012. While we celebrate the openness and opportunity that many of these changes bring, we also experienced the challenge and frustration of people transitioning to other responsibilities, the logistics of scheduling, the attempt to gather people together from across a huge area of geography, and even individuals who decided to leave the team.

We offer this candid word of self-assessment in part because such disclosure is consistent with much of what we have heard in the broad series of interviews, meetings and conversations we have conducted with various parts of the conference including: listening sessions with clergy and laity, Board of Ordained Ministry, Vision Table, the Cabinet, Spiritual Formation Initiative Team, Stewardship Task Force, Council on Finance and Administration, the Parish Consultants Network, Board of Laity, United Methodist Foundation of New England, 2013 Annual Conference session, and through phone conferences and online surveys with a variety of clergy and laity from around the conference. This process generated creative ideas and honest discussion and it affirmed our reality, and we have attempted to bring them to the fore in a way which honors our life together as United Methodists.

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BACKGROUND AND SITUATION

The New England Conference of the United Methodist Church – indeed, the whole UMC - is in a period of turbulence and change driven by both internal and external factors. A strategic plan can enable us to focus our attention and resources in key areas that will allow us to carry out our mission effectively.

God is moving powerfully in New England! Among the more than 90,000 people in our United Methodist churches in this region, there is tremendous life, spirit, and commitment to serving Christ for the transformation of the world. And yet, we are in a period of turbulence and change – from both internal and external forces and factors – and there are significant challenges to our effectively carrying out our mission and living into our vision.

Our Initial Charter

In its report to the 2012 Annual Conference session, the Bishop’s Financial Summit recommended the formation of a Strategic Planning Team and charged the team with examining and making proposals to the Annual Conference concerning the following:

1. The mission, vision and critical values of the Conference
2. The structure and function of the Conference, especially its boards, committees and agencies, with special attention to the alignment of these aspects of the Conference with our mission
3. The number of districts in the Conference and the nature and means of superintendency best adapted to our mission
4. The connection and shared ministries within the Conference and the means to best equip, guide, support and multiply their missional strength
5. The alignment of staff and other resources to our mission to best equip, connect, support and multiply vital congregations
6. The means to equip, connect, support and multiply new places for new people
7. The development of highly transformational lay and clergy leadership
8. The identification and cultivation of human and financial resources needed to undergird our mission.

As the Strategic Planning Team began to undertake this work, we understood that as a Conference we face both significant challenges and opportunities.
CHALLENGES

Ambivalence about connectionalism. Many of the 90,000+ members of the church in New England either don’t know what “the Conference” is or don’t have a connection, understanding, or perceived need of our connectionalism.

Resource allocation. Local churches, the Conference agencies and ministries are working with limited financial and staff resources, and we are challenged to find new and better ways to operate.

Cultural relevance and public perception. The church is no longer the center of community life. There are other things that are competing for the time, attention, and hearts of God’s people. In addition, there are also often extremely negative perceptions about the Church. Media coverage typically focuses more on crisis and controversy than on positive messages about the church.

Model of church. Because of these cultural changes, the model of church is changing, and has left many churches vulnerable and struggling to adapt.

Variety of audiences and multiple strategies. Internal and external, strong churches and struggling churches, clergy and laity, leaders and followers, believers and seekers; there is a wide range of constituents we are trying to serve and to communicate with, each with different interests, attitudes, and needs.

OPPORTUNITIES

Attitudes about change. While a few years ago this may have been a weakness, one of the things we have heard over and over again in our interviews and discussion sessions is that people are ready for deep, transformational change in the way our conference/church is structured and the way we operate to meet our goals. To stay the course has become more frightening than to take risks and to change! While there is still fear, there is much more readiness to see the opportunity, the life, and the freedom in making big changes.

Hope for this process. While there is tremendous anxiety in the system, there is recognition of the need for transformation of the New England Conference, from the Episcopal office, to Conference leadership, to clergy and laity across the connection. Much of the feedback and engagement the Strategic Planning Team has received in this process has both acknowledged pain and pointed toward possibilities.

Connection. The previous focus on shared ministries has had an effect on both the attitudes and the programs of some of our churches, and there is a new openness to finding
ways to connect in relationship and ministry. Our committees and agencies also help build relationships across churches, regions, and theologies. In addition, there are connectional ministries like our camps and retreat centers that provide regional or cross-conference connections.

*Stories.* All of our churches have stories – amazing and compelling stories – of transformation. Many of our churches are already doing new things to reach people and help them develop relationships with Jesus Christ. These examples and stories can help us see potential for more widespread change.

**OUR PROCESS**

**Methodology**

The Strategic Planning team convened in Fall 2012 under the leadership of Evelyn Johnson-Moore and Rev. Herb Taylor. As the work and learning together began, we engaged church strategist Gil Rendle to orient our work and to chart a course. After reading Rendle’s book “Journey in the Wilderness” in preparation for our first meetings, the team spent a day with Rendle in some foundational work and deeper review to guide the process.

**Confronting Reality**

We met with Rick McKinley, Director of Congregational Development and also with Conference Statistician Joy Mueller to get a picture of the reality we are facing as a Conference. The facts confirmed declines in the critical areas we measure for our local congregations:

![Graphs illustrating declines in worship attendance, children's numbers, and full-time appointments.](image)

While this may look bleak, the team identified that this is not the real problem. We think we are drowning, because of declining numbers, but this is just a symptom. The real questions are: What are the underlying challenges we face? What are the opportunities we can take advantage of to move us to a different future?
Listening and Sharing

The team presented a report and engaged in some in-depth and interactive listening and sharing time during the 2013 Annual Conference session. Next, the team engaged with conference groups, committees, boards and agencies to gain additional input and insight into the work of creating a strategic plan for the New England Conference. We sought input from any and all persons around the Conference that wished to share thoughts, issues, and ideas. An online form was made available to allow everyone to provide feedback.

Overall, we met with, shared, listened to, and read input from nearly 1000 clergy and laity from all around the Conference. In all of our discussions, we began by reflecting together on Matthew 14:22-33:

Immediately he made the disciples get into the boat and go on ahead to the other side, while he dismissed the crowds. And after he had dismissed the crowds, he went up the mountain by himself to pray. When evening came, he was there alone, but by this time the boat, battered by the waves, was far from the land, for the wind was against them. And early in the morning he came walking toward them on the sea. But when the disciples saw him walking on the sea, they were terrified, saying, “It is a ghost!” And they cried out in fear. But immediately Jesus spoke to them and said, “Take heart, it is I; do not be afraid.”

Peter answered him, “Lord, if it is you, command me to come to you on the water.” He said, “Come.” So Peter got out of the boat, started walking on the water, and came toward Jesus. But when he noticed the strong wind, he became frightened, and beginning to sink, he cried out, “Lord, save me!” Jesus immediately reached out his hand and caught him, saying to him, “You of little faith, why did you doubt?” When they got into the boat, the wind ceased. And those in the boat worshiped him, saying, “Truly you are the Son of God.” (NRSV)

What We Heard from You

Through numerous discussions and input from a variety of perspectives in diverse settings and groups, the responses were consistent in answer to the basic question of “What is needed for the next 3-5 years to move toward a vision of making disciples for the transformation of the world?” A summary of the responses includes a focus on discipling and training, changing our focus from internal to external, and taking risks for the gospel:

- Discipling – Teach it, Model it, Be it!
- Train clergy and lay leadership for a new age
- Pursue new models of ministry

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• Establish faithful and engaged presence in communities we serve
  o Church has left the building
• Partner with others in our communities
• Focus on rebuilding communities, not buildings
• Total inclusiveness
• Get out of comfort zone
  o Push ourselves
  o Make tough decisions
• Pray, serve, risk …. And pray some more
• Change in structure/re-organize
• Tell our story and Jesus’ story (better marketing)
• More focus on evangelism
• Better means of communication
  o Adapting for next generation
  o Web/social media/worship
• Radical change to how we use our financial resources
• Acknowledge pain and create possibilities
• Do something – take action
• Live out the Gospel

STRATEGIC THINKING

After this time of focusing on conversations and learning, we began to develop proposals for purposeful change.

Key Goals for the Strategic Plan

It is important to recognize that this is not a tactical plan. A strategic plan charts a course, and makes recommendations for implementation, which are carried out by the various agencies, groups, and individuals responsible for their respective areas.

The goals for the Strategic Planning group were to do exactly what our Conference Mission Statement says: to create a plan that would enhance our ability to Equip, Support and Connect local, regional, and global ministries...

Of course, the ultimate goal is for our conference structure and ministries to be focused on making disciples of Jesus Christ for the transformation of the world, and to help local
churches – regardless of their size – to become vital faith communities\(^1\) with life-changing ministries who are living out the conference vision and mission through:

- Inviting and inspiring worship, regardless of what “style” of worship is yours
- Engaged disciples in mission and outreach in their communities and in the world
- Gifted, empowered and equipped lay leadership
- Effective, equipped and inspired clergy leadership
- Faith forming small group ministries
- Strong children and youth ministries

**Recognizing Adaptive Challenges**

The team identified the challenges we face as a Conference as adaptive, rather than technical.

**Technical Problems vs. Adaptive Challenges**

<table>
<thead>
<tr>
<th>TECHNICAL</th>
<th>ADAPTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy to identify</td>
<td>Difficult to identify (easy to deny)</td>
</tr>
<tr>
<td>Often lend themselves to quick and easy (cut-and-dried) solutions</td>
<td>Require changes in values, beliefs, roles, relationships roles, relationships, and approaches</td>
</tr>
<tr>
<td>Often can be solved by an authority or expert</td>
<td>People with the problem do the work of solving</td>
</tr>
<tr>
<td>Require change in just one or a few places; often contained within organizational boundaries</td>
<td>Require changes in numerous places; usually cross organizational boundaries</td>
</tr>
<tr>
<td>People are generally receptive to technical solutions</td>
<td>People often resist even acknowledging adaptive challenges.</td>
</tr>
<tr>
<td>Solutions can often be implemented quickly—even by edict</td>
<td>“Solutions” require experiments and new discoveries; they can take a long time to implement and cannot be implemented by edict</td>
</tr>
</tbody>
</table>

If we were about simple change, this task force could offer solutions that would “tweak” what we are already doing. Ultimately, it is the core leadership of the conference (Cabinet, Board of Ordained Ministry, and others) who are the ones who need to develop specific strategies for aligning resources, assuring excellent leadership, and supporting those changes with intentional systems of accountability.

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\(^1\) from the Vital Congregations Initiative (more at www.umcvitalcongregations.org)
Purposeful Change

A key focus question was “What do we need to pay attention to in the next 3-5 years in order to be more faithful to the vision of making disciples for Jesus Christ for the transformation of the world?” Through this discovery process, we believe the primary areas that require purposeful and significant changes are:

- **Leadership recruitment**, development, and support for clergy and laity
- Intentional focus on **spiritual formation**
- Deepening **connectional relationships** for support and accountability in fulfilling our mission

How do we rethink our work in these areas rather than just working harder at what we already know? There were several ideas that we developed, worked with, and tested out with the cabinet and Bishop.

And so the following pages will share our recommendations for:

1) A leadership summit to develop and align resources for excellent leadership;

2) Intentional connection of those agencies, people and places that focus on spiritual formation; and

3) A recommendation to the Cabinet to transform the superintendency so as to develop the means to focus on “strategic missional thinking” in the districts.

It is important to note that in many areas there is overlap in the sections and strategies and that there are not distinct categories even though we have organized the information into key focus areas. For example, some of the strategies for Leadership Development and for Spiritual Life are identical, related, or intertwined, because leadership and spirituality are intertwined. Thus, the appearance of a strategy in one section may have influence and impact in other sections and strategies as well; for example, strengthening leaders may also have an influence on stewardship practices.
Vision, Mission, and Critical Values

Our first task was to review and reflect upon the vision, mission, and critical values of the Conference, and to revise, replace, or reaffirm these elements.

Conference Vision Statement

Transformed by the Holy Spirit,
united in trust,
we will boldly proclaim Christ to the world.

The Conference Vision Statement is a strong one, and one that each and every United Methodist in New England should be striving toward. No matter how diverse our geographies, situations, or theologies, whether as individuals, as congregations, as the conference, as the Church, we should all seek to be:

- Transformed by the Holy Spirit
- United in trust
- Boldly proclaiming Christ to the world

The Vision Statement is widely applicable to the work we are doing and need to do. It supports and informs our overall objective and mission to make disciples of Jesus Christ.

Recommendation: We suggest that the Conference Vision Statement be carried forward to the new plan.

Conference Mission Statement

The Conference Mission Statement goes a step further, specifically stating how the Conference staff and resources will work toward the goal of making disciples.

Our Mission as the New England Conference is to equip, connect, and support local, regional and global ministries to make disciples of Jesus Christ, and to serve all in his name.

This is a broad statement, and elements of the plan should be concrete expressions of our means to “equip, connect, and support” the ministries of our conference and the church. An open and broad mission statement allows for flexibility in planning from year to year (or

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quadrennium to quadrennium), and can provide a foundation for ongoing visioning and planning. We see this mission statement as a benchmark for our work, and it can and should be at the forefront of any existing or new expenditure of time, effort, or resources, with questions such as:

- How will (this effort) equip, support, or connect ministries in our conference/churches?
- How will it better enable us to serve Christ and make disciples?

**Recommendation:** We suggest that this Mission Statement be slightly edited in the final sentence to bring it in line with the overall UMC Mission as well as to add the component of the impact of what we are doing:

> Our mission as the New England Conference is to equip, connect, and support local, regional and global ministries to make disciples of Jesus Christ for the transformation of the world.

This mission guides the plan. Current and future plan elements should be evaluated on how well they equip, connect, and support our churches in efforts to make disciples of Jesus Christ for the transformation of the world.

**Five Critical values**

Five Critical Values or focus areas have been named by the New England Conference:

1. *Spiritual Life.* We are a people who yearn for God and seek healing and spiritual life through Jesus Christ in order to be united in trust and mission.

2. *Evangelism and Church Growth.* As a people who yearn for God, we recognize that others yearn with us, and we will reach new people with the Gospel of Christ.

3. *Area Diversity.* As a people who yearn for God, we recognize that racism and all forms of discrimination undermine our ability to further the ministry of Christ.

4. *Equipping Leadership.* As a people who yearn for God, we will equip our churches, clergy, and laity for unabashed pursuit of effective ministry.
5. **Stewardship.** As a people who yearn for God, we will be connected and accountable to God and to each other in the ways all our resources support the shared ministries of our congregations, our conference in New England, and Church throughout the world.

These issues are as relevant today as when they were first articulated. However, we need to refine them, and then more strongly incorporate them into our goal setting and resourcing efforts.

**Recommendation:** *We suggest the following re-articulation and expansion of our critical issues/values.* These priorities give us particular areas of emphasis to guide our strategies and decisions:

1. **Spiritual Life**
2. **Vital Faith Communities**
3. **Diversity and Inclusivity**
4. **Leadership Development and Accountability**
5. **Stewardship**
Spiritual Life

GOALS

• A discipleship culture within the New England Conference.
• People growing in their faith at all ages.
• Faithful disciples teaching our children and youth.

STRATEGIES

• Reprioritize our metrics and focus to be on discipleship, rather than membership.
• Transform the work of the Spiritual Formation initiative into a full Board of Discipleship, to create a comprehensive plan for spiritual formation and discipling for clergy and laity. (also see Leadership Development section).
• Raise the expectations across the conference that every clergy and every layperson in leadership (committee chair) participate in a regular spiritual life/discipleship group.
• Develop a communications plan to support these efforts with stories about churches that have this kind of discipleship in place, and the impact on their church and ministries.
• Focus intentionally on spiritual life/discipleship in Annual Conference sessions and charge or church conferences.

STEPPING FORWARD IN OUR SPIRITUAL LIFE

Spiritual formation is a primary factor in renewal. At the same time, the Strategic Planning Team struggled with how to address this need, as technical solutions are not necessarily going to fix a problem which has developed over decades – and not just in the UMC. And yet we know that:

• Laity are hungry for God. How can we help them recognize the presence of God in their lives, and guide them into deeper discipleship?

• Pastors are doing their best to be faithful ministers in their congregations and communities. How can we equip them to be better able to reach the unchurched and develop disciples?
• All of us live in a culture where we have too much to do in too little time. **How do we shift priorities so that practicing spiritual disciplines becomes a way of life?**

**“Walk with me”**

“**Walk with me, I will walk with you...and build the land that God has planned where love shines through.”** (Hymn 2242, The Faith We Sing hymnal)

Imagine if, at every level – from early childhood through adolescent through adulthood, through every level of training, be it local pastor or ordination track or lay leadership – we put all of it within the paradigm of mentoring/apprenticing others to grow in love of God and neighbor. Imagine the impact this could have.

**Shift from “membership” to “discipleship”**

The reality is that many of our churches are experiencing decline in membership and many are struggling for survival. The denomination and the conference, and the clergy and laity alike in these churches, are often focused on the technical problem of “church membership,” and we have actually adapted away from the knowledge and practices of how to help form people in faith. Instead of putting out a product (worship service, program, Bible study, service project) we need to better understand how those fit into a process of forming people to **grow in love of God and love of neighbor.**

The good news is that we also have many churches who already understand that growing disciples is the right focus, and church growth is an “outcome.”

However, making this a cultural shift within the conference and within our local churches will take prioritizing discipleship over membership at all levels: conference, district, local church, clergy, and individual member!

**Making spiritual life our priority**

As we go forward, this means engaging everyone – clergy and laity – in the practice of **spiritual disciplines on a regular basis.** It means raising the expectations that our laity in leadership will participate in regular discipleship groups, Bible study, hands-on mission, fasting, prayer, Sabbath and self-care, faithful stewardship, and sharing their faith with others.

If we expect this for our laity, we expect these same things for our clergy as well. Every clergyperson should be engaged in a covenant/accountability group, regularly practicing
spiritual disciplines, exercising faithful stewardship, and being attentive to self-care and Sabbath time.

At the conference level, we will shift from a Spiritual Formation Initiative to a **Board of Discipleship** for overseeing a comprehensive plan of spiritual formation and discipling at all levels of the conference for all ages, for laity and clergy. Our budget will be aligned to make spiritual formation of laity and clergy a priority as one of our five critical values. Annual conference sessions and charge or church conferences will be less focused on legislation and more on celebrating who we are as United Methodists, recommitting ourselves to mission and ministry in Christ for the transformation of the world.
Leadership Development and Accountability

GOALS

- Strong, well-trained, faithful leaders at every level of church life.

STRATEGIES

Overall

- Establish a leadership summit to develop and align resources for excellent leadership; to focus on:
  - Analyze and determine models of clergy leadership for the future in New England.
  - Develop a plan for clergy recruitment, development, and retention, as well as for vocational transitioning as needed.

- Increasing availability of training and resourcing in a variety of delivery systems ("live" resourcing days, conference library, online trainings, webinars, etc.).
  - Increase communication of the availability of these resources.
  - Provide comprehensive listing of outside training and resourcing opportunities, beyond the conference or denomination.

- Grow the number of churches being assessed and served by Congregational Development coaches:
  - Identify, evaluate and develop an action plan with 3-5 churches annually in each district.
  - Employ a variety of tools/resources tailored for the specific needs of each congregation.

Leadership Development for Clergy

- Strengthen our system of mentoring/apprenticeship for new local pastors, commissionees, and ordinands.
- Establish a minimum threshold of attendance at spiritual formation, resourcing, and training events.
- Require clergy to participate in a learning/covenant group.
Leadership Development for Laity

- Standardize resources and processes for District Leadership and Lay Servant Academies across the conference, while allowing for flexibility and creativity on a district-by-district basis. Utilize well-functioning Academy teams to train/resource other districts.
- Require participation in at least one Lay Servant Academy or District Leadership Academy for leadership (chairs) on church boards and committees.
- Local church committees will conduct an annual review of Leadership “Guidelines” for each local church committee.
- Participation in regular Bible study or covenant group as a prerequisite for leadership (conference to recommend 3-4 resources: Disciple, Companions in Christ, Covenant, etc...).

STEPPING UP INTO LEADERSHIP

Spiritual formation and leadership are similar in a lot of ways, and much of what is included in the Spiritual Formation section is also applicable in Leadership Development. The New England Conference has a wide range of offerings for leadership development on a regular basis for both clergy and laity.

In addition, in the past year, the New England Conference has added new “Resourcing Days” in each district, bringing in leaders and experts from around the country to resource our congregations, clergy and laity around many of our critical values/priorities: spiritual formation, worship, stewardship, evangelism and outreach, and more. These Resourcing Days have been well attended, and are already bearing fruit in our congregations. These opportunities should be continued.

Clergy

Establishing a meaningful system of mentoring/apprenticeship, as mentioned in the Spiritual Formation section, will impact not only the spiritual life of our clergy, but also their leadership capabilities. In addition, there are some other key focus areas to help strengthen and support our clergy leaders:

- **Establish Leadership Summit with BOM and Cabinet** to clarify expectations for clergy, and to develop a plan for clergy recruitment, development, retention, and vocational transitioning by early 2015.
• Require SPRC and District Superintendent to perform a clergy evaluation annually, focused on ministerial effectiveness. We recognize that there have been a number of evaluation tools over a number of years.
  o 2-3 tools will be recommended (choice)
  o Training will be offered for SPRCs on using these tools

• Establish Resourcing Days to enhance spiritual life and leadership training/resourcing for clergy (and laity). **NOTE: This is already happening!**

• Conference: communicate topical workshops, seminars, trainings, from other denominations or institutions that have open enrollment and could be valuable training for our clergy and/or laity.

• Require clergy to attend a minimum number of Leadership Academy, Resourcing Days, or supplemental educational opportunities each year (in any district). Coordinate with BOM on articulating these requirements.

• Require clergy to participate in a learning/covenant group.

• **Congregational Coaching** - Congregational Development is already working with clergy and congregational coaching in a number of churches, and is working on developing a comprehensive, long term plan to serve a variety of church sizes and needs. We won’t be able to immediately initiate this level of change with all of the churches that need the help. It would make sense for us, given our structure, to do this on a district level - to get very strategic about choosing 3 - 5 churches each year in a District. Selected churches/pastors for that year would be engaged in specific training and coaching that employs a variety of tools and best practices that can be tailored to meet the specific contextual situations and needs of the individual clergy/congregations.

**Laity**

There are many opportunities for laity in the area of leadership development:

• The **Lay Servant Ministries** offers a proven method for spiritual growth and leadership training, with a standardized model and materials. In the New England Conference many of our districts have Lay Servant Academy teams (or District Ministry Teams that perform this function). However, some of our districts offer them more or less frequently, and in different formats. Those districts with well-functioning teams should assist other districts. Develop a standard of 1-2 Lay Servant Academy sessions in each district each year.

• **Leadership Academy** – The format of the Leadership Academy is more open and flexible than the Lay Servant Academy. In addition, these sessions are also open to clergy as well. These offer training on topical issues in church leadership, and
functional training for committees: SPRC, Trustees, etc. As with Lay Servant ministries, some of our districts have established Academy teams and regular offerings, and some do not. Standardizing these in terms of frequency and quality, while allowing for flexibility in format and topic, will enhance leadership trainings across our conference.

- **Committee Training** - In addition, every layperson serving on a committee should be trained for the work of that committee. This seems like a daunting task, but there are “Guidelines” resources for every type of committee a local church might have (there are dozens of Guidelines booklets). Having the pastor and/or committee chairs trained first, and then providing each committee member with the Guidelines (booklet, online training presentation, etc), can offer additional focus and knowledge for committees as they do their work.

- **Study/Covenant Groups** - Encourage laity to participate in a learning/covenant group. Laity in leadership positions (committee chairs) should be in a regular Bible study/covenant group.

- **Resourcing Days** – As noted above for clergy, these Resourcing Days are open to laity as well.
Vital Faith Communities

GOALS

• Vital faith communities, liberated for the mission of making disciples.
• Understanding and commitment to our common mission.

STRATEGIES

• Understand and build awareness of the flexible definition of a vital faith community.
• Articulate a “theology of property” that can help congregations reimagine church buildings and their use.
• “Right-sizing” all congregations: Achieving appropriate balance in clergy appointment time, building size, and budget for all congregations.
  o Aligning clergy appointments to be appropriate for congregation size/budget by the 2017-2018 appointment year
  o Assisting congregations in assessing building requirements for current ministry
  o Requiring congregations to create a plan for financial viability/sustainability
• Provide support and resources for congregations to learn, affirm, and participate in our common mission and the strength of our connection. (Also see Stewardship section).

STEPPING AWAY FROM “ONE SIZE (OR STYLE) FITS ALL”

While the areas of Spiritual Formation and Leadership Development and Accountability will do much to build and strengthen the vitality of faith communities, there are some additional points and strategies not easily categorized in these sections.

Defining and embracing the idea of vital faith communities.

We recognize that vital, healthy congregations come in many shapes, sizes, and styles. Some are in traditional church buildings, some in downtown storefronts, some are house churches. Some worship on Sunday mornings, some on Wednesdays, some on Friday or Saturday evenings.
It is important for the Conference and its leadership to recognize, affirm, and support the variety of models and expressions of church that God calls us into to serve the present age. It is also important to understand that accommodating this variety offers new levels of complexity in leadership development, Board of Ordained Ministry practices, Mission Shares, and almost every area where standardization and “best practices” are applied.

The United Methodist denomination has been attempting to move the focus of our metrics to counting more than just members, and has done well at developing a definition for “vital congregations” that is both specific and flexible enough to fit congregations of many different types and sizes.

Vital congregations equip and empower people to be Disciples of Jesus Christ in their homes and communities around the world.

Vital congregations are ones that are:

- Spirit-filled, forward-leaning communities of believers that welcome all people (Gal. 3:28)
- Places where Disciples of Jesus Christ are made through the power of the Holy Spirit. (Matt. 28:18-20)
- Communities that serve like Christ through justice and mercy ministries. (Micah 6:8, Luke 4:17-21)

We hope that every faith community can locate their identity within this definition. However, it is important to note that the way that each faith community lives out this definition can vary widely.

A STEP FURTHER

A few other elements can help us to accommodate our variety and also embrace the unique Wesleyan identity of churches within The United Methodist system:

Communities that support the sharing of resources toward common goals and missions. This can mean shared ministry between regional churches (such as a “circuit youth group”), a commitment to full participation in Mission Shares (see Stewardship section), or even a new way to look at multi-point charges. As we understand that some churches are less “connected” than others, more Conference effort should be focused on building awareness, understanding, and support for the nature and value of our connectional ministry.

UPDATED June 2017
Communities with a healthy “theology of property.” Much has been said in recent years about the burden that many of our church buildings present to their congregations. Skyrocketing maintenance and operational costs, deferred maintenance, or an inappropriate building size/functionality for the current congregation are all factors that cause congregations to struggle with how to deal with these issues and their costs, while taking valuable leadership time and congregational resources/funds away from the mission of the community.

This does not mean that buildings are the problem. We understand that a church building can be a valuable asset for ministry in and with the community. However, even when a church building has outlived its usefulness to the current congregation and community, it is often fiercely protected and defended by the congregation’s leadership and members. More education on a theology of property and alternative ministry models can offer a way to help us to recognize when Christ is calling us into a new structure or framework for our ministry.

Right-sizing congregations to achieve the appropriate balance of resources for ministry. Finding an appropriate building size/structural model for a congregation’s ministry is one aspect of this balance. Another area where congregations may be over-served and overspending for the size and needs of the church is in their pastoral appointments. Part of the Conference responsibility is to set standards for % time of appointments for pastoral leadership in congregations. These standards can include a combination of:

- Understanding where the congregation is in their lifecycle.
- Number of members/constituents/covenanting disciples.
- Those participating in worship on a regular basis
- Overall ratio of giving/member
- Congregation’s participation in mission shares
- Community demographics, size and needs

Other factors may be agreed upon by the congregation and the District Superintendent on a short term basis while the congregation works toward the appropriate standard range.

The goal is for all congregations in the New England Conference to have the appropriate appointment time for their pastoral leadership by the 2017-2018 appointment year, and for each congregation to develop a plan for vitality and financial sustainability.
Superintendency

GOALS

- A model of superintendency that best allows for deeper relationships between superintendents and local churches in the districts so as to live out our mission of discipleship making.

STRATEGIES

- The Cabinet will hire an outside nonprofit consultant to work with them to develop a plan to transform the superintendency so as to focus on “strategic missional thinking” and other responsibilities as stated in the Book of Discipline in their districts for implementation in 2016.
- Key to the plan will be to examine the roles and responsibilities of superintendents, to determine:
  - what is critical to enable superintendents to operate more effectively as missional strategists;
  - what can/should be allocated to others and what other requirements, roles, or positions might be needed to facilitate the effective implementation;
  - what is currently in the job description that needs to be let go of.

STEPPING INTO DEEPER CONNECTION

We believe that the structure of the District Superintendency was established for the church of the past and a new structure is needed for the future. We heard from both clergy and the cabinet that the role of the District Superintendent is overwhelming and not able to impact the majority of the local churches within a district. The District Superintendent is called in the Discipline to be, among other things, a Mission Strategist, but is consumed by administrative responsibilities.

The Strategic Planning Team discussed various possible new structures for the Superintendency, from expanding to 50 or 60 small district unit, with part time District Superintendents who also served local churches and acted as superintending pastors responsible for 12 to 15 churches, to reducing the number of Districts and focusing them by State.
The proposed district structures focused on strategic teams that would assess congregations and the geographical area for the purpose of:

1. developing teaching parishes for new pastors;
2. supporting and resourcing growing, vital congregations as needed;
3. identifying churches nearing death and resourcing with pastors trained in helping churches end well; and
4. establishing new communities of faith in populations not presently served

During the time that the Strategic Planning team has been developing such ideas and models, our Bishop has been working with the Cabinet to assess and adjust their roles, focus, and work. Our present leadership was not fully comfortable with any immediate implementation of any of the ideas from the strategic planning process, and therefore we propose that the Cabinet, in consultation with the Connectional Table (see Streamlining the Structure section) and with the help of a consultant, develop a plan for the District Superintendency for implementation by 2016 that addresses the needs and means of the future United Methodist Church in New England.

In order to do so, we suggest that the Cabinet use books such as (but not limited to), *Seven Levers: Missional Strategies for Conferences* by Bishop Robert Schnase's, *Spiritual Kaizen: How to Become a Better Church Leader* by Bishop Grant Hagiya, and *Lead Like Butler: Six Principles for Value Based Leaders* by Kent Hillard and Judith Cebula as texts to guide their thinking.
Streamlining the Structure

STEPPING INTO CLOSER ALIGNMENT

Our conference leadership and committee structure has become complex and inefficient with hundreds of committees and task forces each with varying degrees of focus, functionality, and oversight. Streamlining the committee structure will allow for better leadership, more efficiency, and greater alignment with our mission and priorities.

GOALS

- Streamlined and efficient structure for Conference leadership, aligned with our vision and mission, and offering a web of connection.

STRATEGIES:

*Recommendation for a streamlined structure of Conference committees*

*(For the detailed structure, see Appendix A)*

![Diagram of committee structure](image)
The Connectional Table is the center of leadership for the New England Conference, and is charged with the implementation of the vision. This group will operate according to the example of the General Conference Connectional Table, following the spirit of what is laid out for that body in paragraphs 903 and 904 of the 2016 Book of Discipline.

The Connectional Table will elect co-chairs, one laity and one clergy, from among its membership:

a) Six (6) at-large non-staff seats to help ensure diversity, elected by the Annual Conference. The Committee on Leadership/Nominations will nominate six people from a pool of twelve: six clergy recommended by the Board of Ordained Ministry and six laity recommended by the Board of Laity.

b) Bishop (non-voting)

c) Lay Leader
d) Dean of Cabinet
e) Treasurer

f) BOOM Chair (co-chairs will decide among themselves who will represent) g) Chair of Conference Trustees

h) Director of Connectional Ministries
i) Representative of the Conference Commission on Religion and Race

The Connectional Table will gather representatives from all areas of the annual conference leadership for an annual visioning retreat to monitor, evaluate, coordinate and develop goals and budget.

A streamlined committee, board and agency structure is proposed (see Appendix A) to connect to the five critical values:

- Leadership Development and Accountability
- Stewardship
- Vital Faith Communities
- Spiritual Life
- Diversity and Inclusivity

Additional detail on the committee structure, nominations criteria, and where things fit is included in Appendix A.
Diversity and Inclusivity

The team recognizes the paramount importance of this priority, and we believe the commitment to diversity and inclusivity is and should be infused in the other strategic areas. However, this was not part of our charter, and thus the team was not intentional in building specific goals and strategies in a distinct section of this document.

However, we do reaffirm this as a critical value. Conference leadership is currently working on rebuilding and strengthening the Religion and Race committee. This committee will review this plan and all areas to ensure we are continuing to attend to honoring and including the full diversity of God’s children in our churches and our conference. In addition, the conference leadership is encouraged to continue the work of addressing systemic issues of racism, sexism, heterosexism, and all other forms of discrimination in our conference, our churches, and our world.
Stewardship and Mission Share

GOALS

- Decrease proportion of mission shares to local church budgets.
- A healthy balance of allocation of mission shares between local, regional, and global missions, and administrative ministries.
- Increase stewardship focus and utilization of resources in local congregations.
- 100% Mission share participation by every church.
- A culture that understands the life-cycle of congregations, embracing new places for new people, growth, decline, death and resurrection.

STRATEGIES

- Assess the appropriateness of the mission share system
  - Is it in alignment with our strategy for deployment of pastors.
  - Does it support the Conference vision, mission, and critical values?
  - Is the calculation of mission shares appropriate in relation to local church budgets?
- Increase focus on stewardship in pastoral training and continuing education.
- Increase focus on communication to local churches regarding mission shares: videos, downloadable resources, “guest preacher” recommendations, etc.
- Ask each local church to use one of recommended tools and resources for stewardship, available through the Conference and the United Methodist Foundation of New England. Copies of recommended resources will be available in the Conference Library, and/or scholarships for purchasing resources.
- Work with those churches not contributing 100% mission shares on a plan to increase mission share participation each year toward the goal of full participation.
  - Create District Finance teams (note: this model is used in Vermont).
  - These teams will walk with churches to assess, educate, and support churches to move toward full participation in their mission shares.
  - Determine future status of those churches and clergy who consistently do not contribute to mission shares.
- Develop a process that assesses viability of struggling churches and empowers congregations to close in a graceful way.
STEPPING OUT IN MISSION TOGETHER

Unless Mission Shares are at the heart of our connectional identity and mission as United Methodist Church, then our Conference is unsustainable. We celebrate bold witnesses and life-giving missions that our mission shares support and give thanks to God for faithful and sacrificial stewardship of our congregations.

We also recognize that mission shares are perceived as a burden to local church rather than a gift to both local and connectional ministry of United Methodist Church, and that we do not have sustainable budget as a conference. We believe that rethinking and reimagining the stewardship of mission share is critical to the future ministry and mission of both local church and the annual conference.

We have identified following areas for further review and reform:

1. *The allocation of mission share needs to be focused on making disciples and transforming the world.* We need to channel the mission share from maintaining institutional ineffectiveness to investing in our vision and mission, and in alignment with our critical values.

2. *The joy of faithful and generous stewardship needs to be rediscovered in the life of our churches.* Stewardship needs to be encouraged and celebrated as the practice of faithful discipleship and the sacrament of world changing mission.

3. *The proportion of mission share to local church’s budget needs to be assessed.* We believe that the current pace of increase in mission share is not sustainable for most of local congregations.

4. *The calculation of mission share needs to be evaluated.* The current uniform calculation formula assumes that the economic reality of each local congregation and community is also uniform. We need to assess our strategies and formula for local congregations to share the financial needs of our connectional ministry and mission equitably, not necessarily equally.
Next Steps

God is at work in the New England Conference. The Strategic Planning Session has found throughout our work with clergy, laity, and leadership around the Conference a shared sense of urgency and possibility. We are stepping out in faith together, with the knowledge that change is coming, regardless of whether we are ready, and whether we act or not. It is our hope that this plan will provide a framework for the changes that can help us strengthen our ministries and connections as we move into the future that God has planned for us.

While the presentation of this plan concludes the work of the Strategic Planning Team, we realize that much of the difficult work is still ahead – for the Connectional Table, the Leadership Summit, and the rest of the conference leadership teams, for our clergy, laity and congregations. Our Bishop, Sudarshana Devadhar, is committed to the implementation of the strategies proposed in this plan, and will be working with the Cabinet and leadership to enact these recommendations.

Some of the initial, critical work will be determining, with the Conference Council on Finance and Administration, the budgetary requirements and implications of the elements of the plan. Nominations for the new Conference structure is also of paramount importance. These will be some of the immediate next steps.

The Strategic Planning Team would like to express gratitude for all those who served on this team, and for all those around the Conference that provided input, guidance, and critical reflections on and for this work. This plan is not just the thinking of the members of the planning team, but in a real sense it is a reflection of your listening to God, sharing your thoughts and ideas, and your willingness to step out in faith together. We have been blessed to be a part of this journey with you.

The Strategic Planning Team:

Herb Taylor (co-chair)  
Evelyn Johnson Moore (co-chair)  
Bishop Sudarshana Devadhar  
Erica Robinson-Johnson  
Bill Burnside  
We Chang  
Aida Fernandez  
Will Green  
Joan Humphrey  
Charles McCrea  
Rene A Perez  
Caryl Walsh  
Rene Wilbur  
Alexx Wood
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The Connectional Table will elect co-chairs, one laity and one clergy, from among its membership:

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h) Director of Connectional Ministries
i) Representative of the Conference Commission on Religion and Race

The Connectional Table will gather representatives from all areas of the annual conference leadership for an annual visioning retreat to monitor, evaluate, coordinate and develop goals and budget.
**Leadership Development and Accountability**
These are groups responsible for creating a culture of leadership excellence among the clergy and the laity.

- Cabinet
- Board of Ordained Ministry
- Board of Laity
- Lay Servant Ministries
- Nominations
- Episcopal Office

Staff support/accountability: Extended Cabinet, BOOM registrar; Administrative Assistants

**Stewardship**
These are groups responsible for the administration and stewardship of the conference resources.

- Pensions and health
- Episcopacy
- Personnel
- Archives and History
- Communication
- Trustees
- Equitable compensation
- Finance & Administration
- Rules and Sessions

Staff support/accountability: Bishop, Assistant to Bishop, Cabinet, Treasurer/ Administrative Staff, Director of Communication

**Vital Faith Communities**
These groups are responsible for developing ways to revitalize and spiritually nurture churches and their local communities.

- Parish and Community Development
- Contextual Ministries: urban, rural, small membership and large membership, ethnic
  - Hispanic/Latino Ministries

Staff support/Accountability: Director Congregational Development, Hispanic/Latino Director

**Spiritual Life**
These groups will lead the conference in connecting people and God.

- United Methodist Men
• United Methodist Women
• Youth
• Young Adults
• Camping and Retreat Ministries
• Higher education and Campus Ministry
• Discipleship
• Board of Global Ministries

Staff support/Accountability: Director of Missional Initiatives, Education Resource Director, Director of Connectional Ministries

Diversity and Inclusivity
These groups will lead the conference in areas related to social justice and strengthen our efforts in a fully inclusive church and world.

• Church and Society
• Ecumenical and Interreligious Ministries
• Status and Role of Women
• Religion and Race
• Disability concerns

Staff Support/Accountability: Director of Connectional Ministries

Membership and Nominations

1. Ensure that we have the thirty-four agencies that are mandated by the Book of Discipline, or some agency designated to do that work. An agency is a Board, Commission, Council, or Committee.

2. Rename the Conference Vision Table as the Connectional Table to parallel the structure of the General Church.

3. Continue the following agencies which are named but not mandated in the Book of Discipline, to provide for the operation of the Conference: Committee on Leadership/Nominations, Committee on Rules of Order and the Sessions Team.

4. The Committee on Leadership/Nominations (COL/N) is comprised of a chairperson nominated by the COL/N, and members who are ex officio or appointed by the group they represent and shall include: conference lay leader or designee; one UMW representative; one UMM representative; one member from each district leadership committee, chosen by the conference leadership committee from two names submitted by the district leadership committee so as to increase diversity and inclusiveness; one or two youth; one or two district superintendents; conference
secretary; Director of Connectional Ministries; one representative from each of the identified ethnic groups functioning within the Conference structure; and additional people needed for technical assistance, as identified by the Leadership Committee. Members shall serve for four years.

5. Nominate eight people to each Conference agency unless the Book of Discipline mandates a different number of members or the New England Conference strategic plan stipulates a number other than eight members. Agencies may add additional persons without vote to provide expertise, diversity, or to assist in carrying out the ministry. People will serve two year terms for a total of four terms or up to eight years unless Book of Discipline mandates a different term structure. Each agency shall have an equal number of laity and clergy unless the Book of Discipline mandates a different formula. The Bishop, in consultation with the Conference Lay Leader, is responsible for nominating the Personnel Committee of the Annual Conference on a two-year basis to be elected by Annual Conference.

6. The remaining 2013-2016 quadrennium will be a time of transition so that those already elected to agencies included in the organizational plan may complete their terms.

7. All affiliated organizations, particularly those separately incorporated, that have a relationship with the Conference by the election and/or appointment of board members by the Conference shall have a relationship statement approved by the Annual Conference Session and by the governing board of the organization. Relationship statements are to be reviewed and reaffirmed at the Annual Conference Session following General Conference. Any separately incorporated organization that does not have a relationship statement shall have one developed and approved by the 2015 Annual Conference Session.

8. All the provisions approved in the Strategic Plan adopted June 2014 will supersede all previous plans, documents, policy, guidelines and procedures previously adopted and/or in use by the New England Annual Conference.

**NEAC-specific groups (not designated in BOD)**

**New Alignments: Where Things Fit**

- Africa Planning Committee and Nicaragua Covenant is the work of Board of Global Ministry

- Lay Servant Ministries, Spiritual Formation Initiative and the Christian Education Committee are the work of the Board of Discipleship

- HIV/AIDS Ministry is the work of Church and Society
• Course of Study Task Force is the work of **BOOM/DCOM**

• Joint committee on Incapacity/Disability is the work of **BOOM/Cabinet**

• Scholarship Committee is the work of the Commission on *Higher Ed and Campus Ministry*

• Monitoring and Evaluation, Racial Harassment Prevention/Response Team, Cross-Racial Appointment Task Force, Anti-Racism Steering Committee, Anti-Racism Training Group is the work of **Religion and Race**

• Ethnic Concerns: Asian, BMCR, Hispanic, Korean, are not conference-appointed or elected but affinity groups/caucuses self-selecting and monitoring, with the exception of CONAM, which is required by the BOD.

Regional Ministries including UMEM, UMUS, WAUM, etc. are just that regional ministries and are not conference appointed or elected groups. They may have relationship statements with NEAC.