Appendix Section

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NOTE: Each document included in the Appendix Section is available as an individual document from the Office of Congregational Development. Please contact **Patrick Ferguson** (<u>pferguson@pnwumc.org</u>) for more information.

The Art of Theological Entrepreneurship

An Overview by
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When it comes to a central characteristic that is typically sought in potential church planters, having an "entrepreneurial spirit" rests high on the list. Based on context and circumstances, pastors and/or community leaders often find themselves operating as social entrepreneurs, standing in the gap for communities in ways that local, state, or national agencies may be unable (or unwilling) to do so. When it comes to new church development, church planters need to be willing to take big risks, which from a business/financial position is traditionally classified as being "entrepreneurial," and often perceived as counterintuitive to the pastoral office. The challenge is that most pastors-turned-church-planters do not have a business background and lack the beneficial foundation from which to lean into this valued characteristic. Because of this, it is necessary to think about how to engage one's entrepreneurial spirit from a theological position. I am calling this approach *theological entrepreneurship.*

Think of a theological entrepreneur as someone who works to creatively harness ideas and opportunities that reveal how our theology intersects culture in ways that put theory into action — ways that shift us from playing it safe and turn us to the risky, leading-edge action we find in the biblical narrative. Think of it like dreaming big then working to practically make the dream into a reality, through strategies that are aligned with our mission. In the church these efforts are supposed to center on all the many facets of disciple-making in a specific missional context, which is deeply rooted in a grounded vision of God. And, from our Wesleyan heritage, this means it cultivates personal piety and social holiness in ever-shifting cultural contexts.

When you address this concept from a strategic position, theological entrepreneurship happens through acute listening to real people within a specific context, ministry plan development, gathering and connecting stewarded resources (people, financial, and creative support), and establishing appropriate metrics that reinforce growth, sustainability, and multiplication. Such efforts operate within our church polity and work synergistically with civic/community programs, services, and new business models.

Those who struggle with the challenges of sustainability and multiplication, particularly as the church wrestles to define itself in the 21st century, also typically struggle to fully connect the concept of entrepreneurship with "church." Consequently, a different narrative is engaged; one which points to what is impossible rather than possible.

The over-arching narrative of church planting in the 21st century, especially within The United Methodist Church, is one that says unchurched and disconnected people (especially millennials) are extremely resistant

to commitment, specifically in terms of personal participation and financial giving, and who adamantly resist the church. It is true that more folks outside the church might appear less committed and more frustrated, but it is not because they do not want to be a part of something that makes a difference. In fact, more millennials desire to make a significant contribution to humanity (and there are currently more millennials than any other demographic group). What is required is a compelling vision backed up by strategic action.

The larger problem is a failure on the church's part (as a whole) to make a significant difference in the communities we serve. The lack of a bold, compelling vision, which intersects the mission, greatly reduces the possibility of engagement by anyone, whether they are inside or outside the church. When we do not know how to creatively connect entrepreneurial strategies that reveal the theological narrative, we can become stifled by uncertainty — the emotional intersection of "fear of failure" and "risk-taking" faith. The problem becomes exponential within our dominate American consumer culture and it muffles our ability to lean forward in pioneering ways.

Greg Jones, who serves as the senior strategist for leadership education at Duke Divinity School, in his book *Christian Social Innovation: Renewing Wesleyan Witness,* speaks of our desire to discover and develop responsive strategies that lead the church in to renewal, as "social innovation." This also highlights our efforts to align the work of new church development with the that of strategic deployment on the Annual Conference level. Consequently, the Greater Northwest Area Cabinet bolsters what we are referring to as "disruptive innovation," which encourages pastors and lay leadership to question the status quo and respond from an entrepreneurial position and a prayerful posture.

By definition, being entrepreneurial means to demonstrate a risk-taking spirit that points toward a hopeful outcome — what *can* be. And, it demands a willingness to constantly work the problem. Culture is always emerging; however, our attitude of what church can be in ever-shifting contexts is often tempered by the fear we mask, justified by a narrative of preserving what we know, and hidden behind the excuse of impossibility. There is nothing entrepreneurial about such a position.

To say that planting churches in our 21st century American consumer context is extremely hard would be an understatement. It demands innovation, creativity, nerves of steel, a unique ability to create something where nothing exists (on every level), a willingness to reconcile strategic risk with bold steps of faith, an understanding that success does not come without failure, and a deep spiritual maturity that is rooted in Scripture. If we are unsuccessful in managing our personal anxieties and insecurities, we will retreat to the safety of a failing narrative and end up pointing the finger at anything or anyone except ourselves.

In this challenging work, I see two distinct roles for the art of theological entrepreneurship that are central to being a "church planter."

A church planter is both a **pastor** and a **pioneer**.

<u>As a pastor</u>, the planter (appointed as the pastor in charge) represents the pastoral office through Word, Sacrament, Order, and Service. This means that the pastor shares the Word of God through teaching, preaching, counseling, pastoral care, spiritual formation, leadership development, and community engagement. It means that she/he celebrates Holy Communion and Baptism, pointing to God's invisible grace through these visible symbols of reconciliation and love. It means that she/he is responsible for ordering the church in relationship to administrative and spiritual practices that are reflected both individually and

corporately, expressly connectional in our Methodist heritage. And it means she/he reflects the servant posture of Christ, in this work to the world. This role is theological, yet supported by the entrepreneurial.

As a pioneer, the planter represents a second and completely different role; one that is often missed when assessing the desired "entrepreneurial spirit." In this role the planter is a developer on the local church level, which means that she/he develops something out of nothing in every form of what represents Christian community. The pioneer role fosters a business savvy approach to the practical action that is represented in a strategic missional plan. The planter has to boldly embrace the risks associated with developing the infrastructures for a local church to be an institutional center for transformation in a greater community. This begins by way of intersecting culture — being relational in the community and focused on intentional listening. It means pulling together resources and establishing partnerships that firmly connect an emerging vision and new community of faith with the movement and needs of the greater community. Such effort involves developing and implementing strategic initiatives that create growth, sustainability, and multiplication in ministry (to plant churches that plant churches and develop ministries). This will include pooling resources, recruiting, training, creating non-traditional revenue streams, establishing partnerships (ministry, financial, community, etc.), being a visionary, and representing a prophetic voice. This role is entrepreneurial, yet supported by the theological.

Engaging the dominate American consumer culture requires tools, experience, and learning that have not previously existed in the toolboxes of most church leaders. In our 21st Century post-Christian context, the art of theological entrepreneurship can present new gateways, windows, and doorways that lead us to a different expression of being church.

Additional resources/books related to language, culture and identity:

Theological/Culture books

Christian Social Innovation: Renewing Wesleyan Witness
By L. Gregory Jones (2016)

Live Like You Give a Damn: Join the ChangeMaking Celebration
By Tom Sine (2016)

Business/Entrepreneurship books

The Lean Startup: How Today's Entrepreneurs Use Continuous Innovation to Create …
By Eric Ries (2011)

Creativity, Inc.: Overcoming the Unseen Forces That Stand in the Way of True Inspiration
By Ed Catmull (2014)

Considering Language, Culture, and Identity

An Overview by
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Paying attention to how we communicate, gather information, form what we believe, and how we perceive others, is a critical task. There are a number of voices that influence us throughout our lives, shaping who we are and what we believe — our identity. Nowhere is this more important to consider than how it relates to Christian identity formation within American consumer culture.

Over the most recent years, cultural linguistics has drawn on many disciplines and areas. Its applications have enabled fruitful investigation of the cultural grounding of language in several applied domains like World Englishes, intercultural communication, and political discourse analysis. Such investigation helps us understand the deep dialogic layers of culture and identity formation. Cultural linguistics maintains a close connection to semiotics, cognitive linguistics, and its exploration of the role of culture as a source of conceptualizing personal and communal experience.

Connected to our senses, to include vision, hearing, touch, smell, and feeling states, human language is given shape through visual, oral, and written stories. In fact, we tend to make decisions based on how we feel; therefore, when images and stories engage our emotions, we respond, sometimes in unhealthy ways. Imagery, as a prominent role in the expression of language and culture, has been rightfully elevated in recent years, consequently impacting how we perceive and share our human experience in the world.

What are we saying? What are we hearing? How do we respond? Are we on the same page?

The theory of cultural linguistics is deeply rooted in a dialogic understanding of how we communicate as human beings, set our priorities (based on perceived boundaries), find freedom in interpretation (civil, theological, cultural, etc.), set our moral guides, and measure cultural competence. It examines the relationship between language and culture and how different ethnic groups perceive the world and their circumstances. The consideration of this discipline is vital to the work of new church and new ministry development and congregational revitalization, particularly in America, where consumer culture is the dominant stream.

Here are some ways to think of cultural linguistics related to our theological task:

1. <u>The relationship between language and cultural identity</u>: This is especially important when navigating a dominant American "consumer" identity in the United States. Considerations within American consumer culture include personal and corporate positions of the sociological, psychological, philosophical, and theological. Stanley Hauerwas claims that in America the story people own is a story they have inherited, been told, and chosen when they didn't have a story to tell. Hauerwas explains that Christians learned how

to be Americans before they were Christians and that one must understand one's own Judeo-Christian heritage and identity in order to live faithfully today as a Christian in America.

2. <u>The way cultural concepts are embedded in language</u>: How do we tell our story and how does our story relate to other stories and traditions? Leonard Sweet argues that the language of culture today is that of "narraphor" — a story made with metaphors that helps us understand the world, ourselves, and God better.

3. <u>What goes into an utterance — the uninterrupted chain of spoken or written language</u>: An utterance represents the relationship of content and context, as an ever-emerging occurrence that encapsulates many voices (as seen in Mikhail Bakhtin's work). It is a layered expression that sustains meaning from a single point of view.

4. <u>The parameters a communicator must attend to with her/his audience</u>: Knowing one's context is required for effective communications within such context. How is information gathered? In what ways does interpretation happen? How are people setting their priorities? Discovering answers, by way of intersecting culture, is the way toward elevating the gospel message.

5. <u>The dialogical foundation of thinking and speaking</u>: This becomes the bedrock for how we are formed and shaped as human beings. Cultural formation is one of the single most important realities to attend to when understanding people, customs/traditions, language, community, beliefs, etc. There are many layers represented in the formation of one's life and experience.

6. <u>The importance of cultural competence</u>: Cultural competence involves understanding and responding, appropriately, to the distinct combination of cultural variables, which include: age, ethnicity, experience, gender, gender identity, tradition, beliefs, national origin, sexual orientation, race, religion, socioeconomic status, and geographic affinity. Cultural competency evolves over time, beginning with an understanding of one's own culture, ongoing interaction with people from various cultures, and extending through one's own expansion of knowledge.

The practical connection of theology and culture can be understood in the following ways:

1. <u>Scripture, Tradition, Experience, and Reason</u>: This is how John Wesley described the formation of theology (it is dialogic). The complexities of Christian identity and theological formation prove evident in the dialogic nature of one's existence within culture and the world. Taking this into account, especially considering unchurched and disconnected people, acknowledges the numerous perceptions and interpretations of Christianity in America.

2. <u>There are a number of disconnects from Christian language within any given 21st Century ministry context</u>: Do people understand what we are saying and what we mean when we use Christian language? How do we contextually bridge the language gaps between the church and culture? How do we effectively communicate the practical application of Jesus' teachings in the world in which we live? For example, what does redemption or reconciliation or grace look like expressed in our ordinary lives? And, why do they matter? We have to effectively communicate Jesus' teachings — his methods and message — for application, and not only reflection or conversation. Social justice and spiritual formation cannot become mutually exclusive of one another. Instead of a disconnect, we must work in the overlap — the *mandorla* — of spiritual formation and social justice. For Wesley, this meant an polyphony of acts of piety and mercy;

reflected through personal piety and social holiness. Words have to turn into actions and actions must reflect a living expression of our discourse and teachings.

3. <u>We must recognize the many layers of dialogic interplay related to meaning and its dramatic expression in the biblical narrative</u>: What is the situation? — circumstances and events; Who is the storyteller? — author, reader, hearer (point of view); Who are the characters? — theological and historical context of people. How then does the biblical story intersect our personal and corporate story, not for manipulation but for transformation? We have to be translators of our own culture and the biblical narrative.

The importance of language and culture in relationship to the work of new church development and congregational revitalization:

The attention given to the intersection of language and culture helps guide critical awareness of the dialogic formation of Christian identity in our American consumer context. Language — in all the many ways we communicate — is a map. Utilizing this map effectively is essential to accomplishing our theological task, which assists in the discernment of Christian truth in ever-shifting cultural contexts. It requires us, as followers of Jesus, teachers, and leaders in the church, to join the same journey of unlearning and relearning (see Matthew 5 through 7) to which we invite others.

If we do not tend to the scope of cultural linguistics, we miss the mark on the role culture plays in conceptualizing an experience — in our case an *experience* of God. Peeling back the multiple layers of how we communicate — what we say, what we hear, how we respond, how we find common ground, etc. — rests at the foundation of successfully sharing the Good News through every communication channel available. Language, culture, and identity play a signifiant role in:

  - Discernment and assessment
  - Casting vision and ministry plan development
  - Worship design and leading worship
  - Preaching, teaching, and effective communication strategies
  - Hospitality and an effective assimilation process
  - Formative discipleship systems and mission field engagement
  - Reaching unchurched and disconnected people (not other "church" people!)
  - Multiplication in ministry and financial sustainability
  - Leadership development, equipping, and training
  - Spiritual formation and social justice
  - Pastoral care, mentoring, and coaching
  - Leading people where they do not want to go (a mark of leadership excellence!)
  - Anything else we can think of in relationship to what it looks like to **be church** in a changing world

The consideration of cultural linguistics is critical to new church development and vitality. If we choose not to engage this discipline in the areas outlined here (and others as they emerge), we improve our chances of failure in a day and time when the dominate culture demands more of the church. As leaders in the church, together, we must intentionally engage with folks that live in our communities who do not see the church as a valued part of their journey. We must have actual conversations; be curious, listen well, and never assume a problem or solution.

This work is not about becoming culture. On the contrary, it is about discovering the streams and channels that allow you to successfully intersect culture in order to elevate the gospel message above the noise of society. Pay attention to how people communicate, gather information, form what they believe, and perceive others. This may first involve some serious self-reflection. But, no matter what, discover your contextual map and use it, as Paul described in his letter to the Corinthians, "to find common ground with everyone…" (1 Cor 9:22b, NLT), doing whatever it takes to help others *experience* faith, hope, and love.

Additional resources/books related to language, culture, and identity:

Theological/Language/Culture books

American Jesus: How the Son of God Became a National Icon
By Stephen Prothero (2003)

Consuming Religion: Christian Faith and Practice in a Consumer Culture
By Vincent J. Miller (2008)

Speaking Christian: Why Words Have Lost Their Meaning and Power — and How They Can be Restored
By Marcus J. Borg (2011)

From Tablet to Table: Where Community is Found and Identity is Formed
By Leonard Sweet (2014)

Working With Words: On Learning to Speak Christian
By Stanley Hauerwas (2011)

Business/Entrepreneurship/Consumer books

All Marketers Are Liars: The Power of Telling Authentic Stories in a Low-Trust World
By Seth Godin (2005)

Buyology: Truth and Lies About Why We Buy
By Martin Windstorm (2010)

Bright-sided: How Positive Thinking is Undermining America
By Barbara Ehrenreich (2009)

The Art of Choosing
By Sheena Iyengar (2010)

Freakonomics: A Rogue Economist Explores the Hidden Side of Everything
By Steven D. Levitt & Stephen J. Dubner (2009)

New Church Development Baseline Funding Model

Projected 5-year Funding Plan for New Church Projects

Year	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	Total Conference Funding
BoCD Funds	70,000	80,000	100,000	70,000	30,000	0	350,000
Stop loss			250,000				

From 2010-2015 it cost us an average of $345,000 to plant a "successful" church in the PNW

Projected 5-year Stewardship Plan/Goal

Year	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	Total Estimates
(stewarded) Est. Income	8,700	48,000	72,000	96,000	144,000	192,000	560,700
Total Funds	78,700	128,000	172,000	166,000	174,000	192,000	910,700

Shared Ministry

	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	*Full share* 2021/2022	
Giving %	0	2%	3.50%	6.25%	10%	14%	
Amount	0	2,560	6,020	10,375	17,400	26,880	63,235
							6.94%

Shared Ministry Giving paid during this funding cycle could be used in our Forward Step initiative to foster multiplication

Projected 5-year Available Funds for Ministry/Work

Year	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	Total Estimates
(available) Funds	78,700	125,440	165,980	155,625	156,600	165,120	847,465
(fixed costs) Salary/P&I	57,500	57,500	62,500	62,500	67,500	67,500	375,000
(fixed costs) Housing	15,000	15,000	16,000	16,500	17,000	17,500	97,000
Gross Net	6,200	52,940	87,480	76,625	72,100	80,120	375,465

New Church Development Baseline Funding Model
Assumptions & Considerations

The following information is intended to offer clarity to the budgeted examples of the New Church Development Baseline Funding Model. The funding model is indeed a "baseline" to work from. Funding for each project may require special considerations, adjustments, reductions, and even increases, depending on a number of factors — partnering funding, project context, experience of the planter, ethnic ministry, geographic location, etc.

<u>**Labels & Categories:**</u>

Conference Funds = Funds represented as being approved by the Board of Congregational Development in support of a new church project and a ministry plan that clearly communicates goals and realistic benchmarks. We are naming the baseline funding commitment to be $350,000 per project, over a 5-year funding plan. This plan distributes funds in a bell curve pattern, where the maximum disbursement of funds happens in year 3, when our plants have typically needed the most funds available.

Stop Loss = The "stop loss" designation is the maximum amount of conference funds we are willing to put at risk on any given project. This amount is $250,000. The stop loss is exercised by year 3, if the project is not meeting appropriate benchmarks, or the board, DS, and Office of Congregational Development determines that the project is not viable for various reasons.

Est. Income = The estimated stewarded revenue stream that is made up of a combination of personal fundraising efforts of the planter (personal network), giving from the emerging community of faith, developed partnerships/relationships, and other sources cultivated by the planter and developer.

Total Funds = The sum of the Conference funding added to the projects estimated "stewarded" revenue stream.

Shared Ministry Giving % = A incremental increase of shared ministry giving, based on a percentage of total funds, which acts as a "ramping up" toward the future payment of apportionments. This is designed to get our new church plants moved toward sustainability (and chartering) at a healthy pace, while helping the pastor/planter shape the giving narrative. We would like to target chartering for year 6.

Amount = The dollar amounts associated with the designated percentage in each year. Note that a second strategy of shared ministry giving by our new plants (beyond preparation for paying apportionments) is to provide an incentive that supports our expectation of multiplication. How this works (in theory) is that the total amount of shared ministry giving over the course of the 5-year plan/goal (6 year lifespan) will be available in full to the church in year 6 to support moving toward planting an expansion site. In the budgeted example, the $63,235 paid would then go to support the efforts of launching the expansion site. We are also looking to utilize the conference's "Forward Step" program to continue such incentives for future sites, after the church has chartered.

Funds = Total available funds (BoCD funding plus estimated income) in each year and over the 5-year plan.

Salary/P&I = Total costs of salary/pension & insurance, based on a salary of $42,500.

Housing = Total costs of housing allowance for the planter.

Gross Net = The estimated gross net funds that a planter has to work with in the designated year and over the 5-year funding plan. The end goal of the 5-year funding plan is to show how the initial $350,000 of conference funds can be pressed out in support of programming, which is designed to impact the work of ministry in the greater community. You will notice that the top line (BoCD Funds) of the budget provides the total of $350,000 of conference funding, while the bottom line (Gross Net) shows the total of $375,465. We believe the greater the gross net number (above the original $350,000), the healthier the "pace" at which the church is exemplifying vitality.

THE SYNDEO PROJECT:
COHORT PASTOR / CONSULTANT PASTOR COVENANT AGREEMENT

(NOTE: This is a <u>working draft</u> of the Covenant Agreement and will be modified and amended by the cohort members, and/or District and Conference leadership, as necessary.)

This covenant represents an intentional covenant relationship that binds together a cohort (defined as "The Syndeo Project") consisting of cohort members (defined as "cohort pastors" and "consultant pastors") for the purpose of operating in a connected manner that exemplifies kingdom-oriented work as geographically identified Syndeo cohorts (defined and named in connection to district areas). Within the bounds of The Greater Northwest Episcopal Area (Alaska, Oregon-Idaho, and PNW Conferences), this cohort will be represented by cohort members and partnering churches, of which each church would represent a "campus" or "location" of the cohort. Such kingdom-oriented work will first consider the cohort as a whole, and then consider the partnership church ministry, but notwithstanding that the natural emergence of vision from the local church context will inform the overarching focus and initiative of the cohort.

Vision/Mission of the Cohort

The overarching vision/mission of The Syndeo Project is to live our connection to the degree that we are able to more effectively participate in the mission to which Christ has called the church — to "go and make disciples" — lived out in the world as an expression of what it looks like to follow Jesus, make disciples, and transform the world. The partnering churches/communities of faith will share a common vision, target group (primarily turning attention to the unchurched, disconnected, and marginalized), discipleship system, mission field engagement strategies, and leadership development processes. However, nuances in how the cohort vision is implemented in each partnering church's setting will be determined by the community and context.

Pastoral Member Expectations

Critical to the success of The Syndeo Project model is that each cohort member has to exemplify the higher standard of the call to pastoral ministry. This means living out the humility of Christ in every area and aspect of one's life. Participation as a cohort pastoral member will carry high expectations. They include the following:

1. **TRUST & CONFIDENCE**: Each pastoral member commits to being completely open and honest, holding all conversations and discussions in confidence (safe space), unless otherwise agreed upon by the cohort. This expectation rests at the center of re-establishing our connectional heritage, and consequently determines the fruitfulness and success of The Syndeo Project. Each cohort pastor will be required to often "lead people where they do not want to go," which is a mark of leadership excellence. People do not like transformation, change, and doing things differently. You are required to lead by example, by stepping into this new direction, in order to recapture our heritage as Methodists.

2. **AUTHORITY**: Each pastoral member, whether lay, licensed, commissioned, or ordained, remains the pastor-in-charge of their member church (or remains in their current staff role in the local church or extension ministry, if they are a consultant pastor), yet operates with equal authority and voice on the cohort team, serving under appointment by the Bishop. At the same time, each appointed pastor-in-charge will be responsible for the administrative responsibilities of their respective church/charge.

3. **LEAD VISIONARY & CONVENER**: While authority rests with each pastor-in-charge for every church/charge who is a member of the cohort, one pastoral leader will be named/commissioned as the Lead Visionary & Convener of the cohort. This person's responsibility is to elevate the overarching vision of the cohort, which bubbles up from the cohort pastors and churches/community of faiths, and to convene and facilitate the strategic meetings/gatherings of the cohort. The Lead Visionary & Convener will also be the primary voice in reporting to the Office of Congregational Development, with other Lead Visionaries & Conveners from across their respective conferences.

4. **SUPPORT & CONTRIBUTION**: Each pastoral member commits to support the cohort as a whole, first and foremost as the collective "church" (The Syndeo Project, which is assigned and named specific within an area of a district), and agrees to contribute without reservation to the overarching mission/vision of the cohort. Furthermore, each pastoral member agrees to be all-in regarding individual contributions within the cohort, living out our connection and covenant. Per the Book of Discipline, and with regard to cohorts featuring new churches, the District Superintendent is the "authorizing agent" for those projects and, consequently, will offer council and direction should there be any need to work through challenges, differences of opinion, or strategic cohort initiatives so that there is alignment within the district. Additionally, the Office of Congregational Development, primarily represented by the conference developer, will provide strategic support, mentoring, and resourcing.

5. **PRESENCE**: Each pastoral member commits to being fully present at all face-to-face meetings, videoconferences, and designated gatherings, to include being fully engaged in the ministry as a whole, for both the cohort and within each local church context (balancing time and energy, while considering the cohort to represent the church as a whole). For the cohort pastors, this may amount to face-to-face meetings on a regular basis, with rhythm based on the season of ministry. Consulting pastors (if any) should expect to commit

to a minimum of four face-to-face meetings per year, plus occasional video conferences. However, consulting pastors are invited to be engaged in all the meetings and video conferences. Cohort pastors of established churches/communities of faiths will agree to give more time toward the collaborative process of planting new churches with the pastor-in-charge of that new church (as they engage and as they are organized and planted by the cohort — multiplication). Cohort members of newer church plants should expect to spend more balanced time developing and building community within their ministry setting/context.

6.   **ONENESS**: Each pastoral member commits to operate as one unit (The Syndeo Project), whereas the cohort represents a compilation of the church, which shares common threads in vision, related to ministry in the local church context ("campuses" or "locations"). Each cohort partner church may look different in its own contextual/cultural setting (e.g., worship experience and supporting ministries); however, each pastoral member agrees to see the collected efforts of the cohort as **one**.

Cohort Expectations

In addition to individual member expectations, there will be expectations of the collective cohort for each cohort member to consider the following:

1.   **LEADERSHIP & TEACHING**: The cohort as a whole expects that each pastoral member actively participate in shared leadership of the cohort. This also includes participating in opportunities to demonstrate and live this out in partnering church settings that are different from one's current appointment. Active leadership in this way helps remind and reinforce members/attendees on the local church level that they are a part of something much larger. Within this framework, cohort members of more established communities of faith are expected to collaborate on teaching/preaching exchange opportunities that allow for creative teaching outside of the member's home church — a 21st century intentional circuit model. This helps widen the number of voices that shape people in the disciplining process, while also continuing to remind members/attendees that they are a part of something much bigger. Such a teaching/preaching exchange will require advance worship planning.

2.   **COLLABORATIVE GIFTS**: The cohort as a whole expects each pastoral member to effectively offer her/his area of giftedness for the greater benefit of the cohort. This will foster much more effectiveness and efficiency in ministry.

3.   **SHARED RESOURCES**: The cohort as a whole expects each pastoral member to share all available resources the pastor and/or the partnering church has available to help accomplish the overarching vision of the cohort. Such resources can be defined as (but not limited to): electronics, multimedia equipment, curriculum, furniture, and financial. (Note: The sharing of financial resources will deepen cohesiveness, but may not immediately come when established churches are involved in this effort to recapture our connectional

heritage.) All resources remain the property of the partner church, yet are made available to the cohort as shared resources as needed and justified. All financial gifts/giving will follow normal protocol through finance committees/teams, as will tracking by the trustees regarding borrowed equipment, furniture, etc. The bottom line is to cultivate such a high degree of trust and cohesiveness that the members and attendees automatically see themselves as one church with many campuses or locations, and sharing resources is assumed.

4. **BRANDING & COMMUNICATIONS**: The cohort as a whole expects each pastoral member and each partnering church to share in the brand identity of The Syndeo Project mark/logo, as used in all communications of the cohort and the partnering churches, to include (but not be limited to): website, collateral materials, business cards, letterheads, and apparel. Such sharing may be limited in some areas and/or may fully embrace every area. How we communicate the connection aspect of this initiative is critical to rebuilding such a posture into the DNA of existing and new churches/communities of faith that represent The United Methodist Church in the 21st century. Each Syndeo Project cohort, in cooperation with the DS and the conference developer, will establish these communication and branding strategies, customized to each cohort/setting.

5. **GOALS & OBJECTIVES**: The cohort as a whole expects that each pastoral member and each partner church work in collaboration toward identified goals, as determined by the cohort members. Such collaborative work will always be in alignment with the overarching vision/mission of The Syndeo Project. The trajectory should point to becoming an institutional center (self-sustaining) for transformation within the greater communities served by the church. This means that the development and ongoing creative adjustments of a solid ministry/business model that fosters financial sustainability is vital to fruitfulness and multiplication. As we recapture our connectional heritage, we are rebuilding an **expectation of multiplication** back into our churches. In other words, we are developing churches that plant churches that plant churches.

Conference & District Expectations

The expectations related to the conference and the district levels within the Greater Northwest Episcopal Area are as follows:

1. **ADMINISTRATIVE**: While each pastoral member and each partnering church enter into a covenantal relationship to operate as one entity (The Syndeo Project), each church remains on its own charge within the district. Each pastor-in-charge will be responsible for all administrative duties that are required on both the district and the conference levels to include (but not limited to): charge conference, statistical reports, apportionments, pastoral and staff salaries, and pension and insurance.

2. **APPOINTMENTS**: The cohort members will work directly with the Bishop and the Cabinet in the process of appointments related to future partnerships (added cohort pastors/planters) with The Syndeo Project, regarding work in connection to the objectives and goals of the Office of Congregational Development.

3. **DISCERNMENT, TRAINING, & IMPLEMENTATION**: The cohort team also will become an outlet that can actively participate in the discernment process for those who feel called to plant a church. The Syndeo Project model allows selected pastors to be appointed to the cohort in process of planting a church and becoming a pastor-in-charge of a new plant as a part of the cohort. Team members commit to working with the Office of Congregational Development in developing and implementing a ministry plan for planting churches across the GNW, that is adaptable and flexible, and offers the best possible route toward increased and measured success.

Operational Polity and Agreement

While each pastor and partner church will remain on its own charge, reporting to the appropriate district and conference in connection with our current administrative requirements, the cohort will operate under the current polity of The United Methodist Church.

General ministry initiatives, which fall into the category of expectations of the church within its greater community, will happen as discerned on the local church level. However, the ministry activities of each partner church will inform the unfolding and ever-emerging vision related to The Syndeo Project cohort.

Meetings and video conferences will be facilitated on a rotational basis by the assigned/ commissioned Lead Visionary & Convener for the cohort team. Supervisory oversight remains with the District Superintendent, the Bishop, Cabinet, and Office of Congregational Development, as to reflect our current polity and administrative structure outlined in *The Book of Discipline*.

Decisions will be made by way of holy conferencing and prayerful discernment, and always will be measured first against the vision/mission of The Syndeo Project cohort. However, all decisions and the ever-emerging vision always will be informed by the local church context. Should it be necessary, a majority-vote process can be available in the decision-making process, with guidance from the appropriate District Superintendent and the conference developer.

Additionally, compensation for each pastor will be handled on the local church level by the SPRC (or leadership team of a new church start) of each partnering church. For each pastor who is in process with the cohort to plant a new church, salary will be set in accordance with the Office of Congregational Development, per the five-year baseline funding model, set and approved by the Board of Congregational Development.

Annual Assessment and Amendments

As The Syndeo Project cohort evolves and grows in relationship to the ministry objectives of the Greater Northwest Episcopal Area, there will be an annual assessment meeting to discuss any changes or amendments that might need to be made to the cohort covenant agreement. This meeting would happen prior to each annual conference so that such changes and amendments would be implemented to match the appropriate appointment year.

Termination provisions from this covenant agreement (for both the pastoral member and the partnering church) will take place during the annual assessment and in accordance with the appointment process.

Covenant Signatures

This Covenant agreement is entered into with prayer and discernment, that the ministry of The Syndeo Project cohort would exemplify the connectional foundation of The United Methodist Church, in alignment with the ministry to which Christ has called us all, represented in the church. By signing below I hereby enter into covenant as described hereto with those other persons identified by signature, and upon being ratified, therefore will be recognized as The Syndeo Project cohort.

Signed by:

_____   _____

Signature   Signature

_____   _____

Print Name / Cohort Pastor   Print Name / Cohort Pastor

_____   _____

Signature   Signature

_____   _____

Print Name / Cohort Pastor   Print Name / Cohort Pastor

_____

Signature

_____

Print Name / Cohort Pastor

_____

Signature

_____

Print Name / Cohort Pastor

Authorized by:

_____

Signature of Resident Bishop,
Greater Northwest Episcopal Area

_____

Name of Resident Bishop,
Greater Northwest Episcopal Area

_____

Signature of District Superintendent

_____

Name / District

_____

Signature

_____

Print Name / Cohort Pastor

_____

Signature

_____

Print Name / Cohort Pastor

_____

Signature of Dir. of Strategic Faith Comm Dev.

_____

Name / Greater NW Episcopal Area

THE SYNDEO PROJECT:
PARTNERING CHURCH COVENANT AGREEMENT

(NOTE: This is a <u>working draft</u> of the Covenant Agreement and will be modified and amended by the cohort members, and/or District and Conference leadership, as necessary.)

This covenant agreement represents an intentional covenantal relationship that binds together a cohort (defined as "The Syndeo Project") consisting of cohort communities (defined as "partner churches") for the purpose of operating in a "connected" manner that exemplifies kingdom-oriented work as The Syndeo Project—the cohort. Within the bounds of Greater Northwest Episcopal Area, this cohort will be represented by cohort members and partnering churches, of which each church would represent a "campus" of the cohort. Such kingdom-oriented work will first consider the cohort as a whole, then consider the partnership church ministry, but notwithstanding that the natural emergence of vision from the local church context will inform the over-arching focus and initiative of the cohort.

Vision/Mission of the Cohort

The over-arching vision/mission of The Syndeo Project is to live our our "connection" to the degree that we are able to more effectively participate in the mission to which Christ has called the church — to "go and make disciples" — representing the mission of The United Methodist Church, which is "to make disciples of Jesus Christ for the transformation of the world."

Partnership Benefits and Expectations

In living out our connection as "campuses" of The Syndeo Project, the partnership benefits and expectations are as follows:

1. **<u>LEADERSHIP & TEACHING</u>**: Partner churches will actively share leadership related to the cohort. Active leadership in this way helps remind and reinforce members/attendees of partner churches that they are a part of something much larger. Within this model, cohort members of more established communities of faith are expected to collaborate on "pulpit exchange" opportunities that allow for creative teaching among participating partner churches — a twenty-first century intentional circuit model. This helps widen the number

of voices that shape people in the discipling process, while also continuing exposing members/attendees to the cohort pastoral members.

2. **SHARED RESOURCES**: Partnering churches as a whole expect to share all available resources available to help accomplish the over-arching vision of the cohort. Such resources can be defined as: electronic/multimedia, equipment, curriculum, furniture, financial. All resources remain the property of the partner church, yet are made available to the cohort as shared resources, as needed and justified. All financial gifts will follow normal protocol through finance committees/teams, as will tracking by the trustees regarding borrowed equipment, furniture, etc.

3. **COLLABORATIVE GIFTS**: Partnering churches expect to effectively offer collective area of giftedness for the greater benefit of the cohort (addiction, homeless, youth, children's, young adult, hospitality ministries, etc.).

4. **BRANDING & COMMUNICATIONS**: Partnering church are expected to share in the brand identity of The Syndeo Project mark/logo, as used in all communications, to include (but not be limited to): website, collateral materials, business cards, letterheads, apparel, etc. Such sharing may be limited in some areas and/or fully embrace every area. How we communicate the "connection" aspect of this initiative is critical to building such a posture into the DNA of new faith communities that represent The United Methodist Church in the 21st century.

5. **GOALS & OBJECTIVES**: Partnering churches are expected to work in collaboration toward identified goals, as determined by the cohort members and partnering church leadership. Such collaborative work will always be in alignment with the over-arching vision/mission of The Syndeo Project.

Operational Polity & Agreement

While each partner church will remain on its own charge, reporting to their District and the appropriate Conference in connection with our current administrative requirements, the cohort will operate under the current polity of The United Methodist Church.

General ministry initiatives, which fall into the category of expectations of the church within its greater community, will happen as discerned on the local church level. However, the ministry activities of each partner church will inform the unfolding and ever-emerging vision related to The Syndeo Project.

There is no one person in charge of the cohort; however, there may be a designated "Lead Visionary & Convener" of the cohort pastors and partnering churches. Overall authority remains with the Bishop, Cabinet, and Office of Congregational Development, as to reflect our current polity and administrative structure.

Decisions will be made by way of holy conferencing and prayerful discernment of the cohort pastors and consultant pastors, and will, again, always be measured first against the vision/mission of The Syndeo Project. However, all decisions and the ever-emerging vision will always be informed by the local church context. Should it be necessary, a majority-vote process can be available in the decision-making process. Additionally, the cohort would work closely with Rev. Dr. William D. Gibson, Director of Strategic Faith Community Development, who would cast the deciding vote should ever the cohort have an even number of members and was at an impasse.

Additionally, compensation for each pastor will be handled on the local church level by the SPRC of each partnering church. For each pastor appointed to the cohort that is in process with the cohort to plant a new church, salary will be set in accordance with the Office of Congregational Development, per the baseline 5-year funding plan.

Annual Assessment and Amendments

As The Syndeo Project evolves and grows in relationship to the ministry objectives of each Annual Conference, there will be an annual assessment meeting to discuss any changes or amendments that would need to be made to the cohort covenant agreement. This meeting would happen prior to Annual Conference so that such changes and amendments would be implemented to match the appointment year.

Termination provisions from this covenant agreement (for both the pastoral member and the partnering church) will take place during the annual assessment and in accordance with the appointment process.

Covenant Signatures

This Covenant agreement is entered into with prayer and discernment, that the ministry of The Syndeo Project would exemplify the "connectional" foundation of The United Methodist Church, in alignment with the ministry to which Christ has called us all, represented in the Church. By signing below we hereby enter into covenant as described hereto with those other persons identified by signature, and upon being ratified, therefore are recognized as The Syndeo Project.

Name of Partner Church: _____

Signed by:

_____   _____
Pastor Signature   Lay Leader Signature

_____   _____
Print Name / Cohort Pastor   Print Name / Lay Leader

_____   _____
Church Council Chairperson Signature   Other Signature

_____   _____
Print Name / Church Council Chairperson   Print Name / Other

Authorized by:

_____
Signature of Resident Bishop,
Greater Northwest Episcopal Area

_____
Name of Resident Bishop,
Greater Northwest Episcopal Area

_____   _____
Signature of District Superintendent   Signature of Dir. of Strategic Faith Comm Dev.

_____   _____
Name / District   Name / Greater NW Episcopal Area

Alaska Conference   Oregon-Idaho Conference   PNW Conference

ASSESSMENT PROCESS FOR POTENTIAL CHURCH PLANTERS
A Brief Overview

Prepared by
Rev. Dr. William D. Gibson
Director of Strategic Faith Community Development
wgibson@pnwumc.org

Are you interested in new church or new ministry development, or feel called to plant a church?

The following information offers a brief overview of the current assessment process for the Greater Northwest Episcopal Area (Alaska, Oregon-Idaho, and PNW Conferences). This process includes 8 phases. The timeline runs congruent with the appointment year. Project development and recruitment begins each year after September 1st and extends through the end of the year. Each phase ramps up intentional phases of the process.

Assessment Process Phases:

1. Recruiting

Recruiting potential church planters is a challenge. Our current strategy is to recruit, as necessary, gifted and qualified clergy and laity from outside our conference, while simultaneously recruiting and raising up planters from within our conferences.

2. Inquiry

The inquiry phase is the entry point of initial conversations that allows personal passion to be expressed by a potential planter, while allowing the Office of Congregational Development (OCD) to share a vision for a church planting movement in the Greater Northwest Area (GNW).

3. Initial Screening

The initial screening involves an interview with the OCD by way of phone, Skype, or in person. This allows the OCD to gain insight to the potential planter's story, gifts, and passion, while allowing the OCD to more clearly express the demands, process, and strategies currently being employed in our context.

4. Initial Assessment

The initial assessment involves the potential planter engaging an assessment tool. We are currently set up in the Alaska, Oregon-Idaho, and PNW through our Office of Congregational Development to utilize the Church Plant Candidate Assessment through Lifeway Research. This comprehensive tool is now being utilized by Path1

as the primary assessment tool. It allows the OCD to purchase an assessment passcode, which is then provided to the potential planter. After the candidate completes the assessment, the OCD receives the results, which is then used to frame in-depth screening.

5. In-depth Screening

After the candidate has completely the assessment tool, the OCD follows up with probing questions related to the assessments findings. This part of the process encourages deeper reflection and discernment of the candidate, which includes writing a 500 word reflective essay, and allows the OCD to coach the potential planters toward the next phase.

6. Assessment Interviews

Finally, candidates will be interviewed by a small assessment team consisting of representatives from the BoCD, GNW Cabinet, Office of Connectional Ministries, and the Director of Strategic Faith Community Development. Following interviews the team will make recommendations on the potential of each candidate.

7. Assessment Follow up

The OCD will have the opportunity to follow up with the candidate to discuss feedback and next steps.

8. Recommendations for Deployment

The OCD, in conjunction with the BoCD, will then make recommendations for a candidate's deployment in the field, with a particular project. This phase involves the work of the GNW Cabinet and Bishop, along with the development of a compelling vision and ministry plan for a specific setting. Cooperative work with the District Superintendent, as the "chief missional strategist" of the district, is a key part of the deployment phase. Appropriate boards (BoCD) approve funding during this phase.

Assessment Timeline:

Throughout the assessment phases, there is a guiding timeline, which runs congruent with the appointment process. This timeline has allowed for intentional due diligence, through recruiting, adequate assessment, discernment, projected projects, funding, and possible deployment for appointment. This guiding timeline (adjusted as necessary) is as follows:

Sept-Jan:	Recruiting and initial assessment phases; Phases 1-4
February:	Participation in 5 online assessments; Phase 5
March:	Interviews of all candidates by the assessment team and follow up; Phases 6 & 7
March/April:	Recommendation of projects for final funding approval (GNW); Phase 8
	Recommendations for deployment to GNW Cabinet; Phase 8

Board of Congregational Development
Roles & Relationships of the District Superintendent, Liaison, Coach, and Office of Congregational Development

Prepared by
Rev. Dr. William D. Gibson
Director of Strategic Faith Community Development
wgibson@pnwumc.org

The purpose of this document is to outline the primary roles of the District Superintendent, board/committee Liaison, Coach, and Office of Congregational Development, as they relate to supporting our church planters/plants in the Greater Northwest Episcopal. While the following descriptions provide an overview of the primary roles, there may be situations that find overlap. It is our hope that this document can provide clarity for each role as we work to become more effective and efficient in our efforts to plant and grow new churches. Primary roles are as follows:

- **District Superintendent:** *Supervisory & Oversight*
- **Professional Coach:** *Coaching*
- **Board Liaison:** *Communications*
- **Office of Cong. Dev.:** *Resourcing & Mentoring*

See the following descriptions for details on each role and how they relate to one another.

The District Superintendent: Supervisory & Oversight Role

Per The Book of Discipline of the United Methodist Church (BOD), the District Superintendent is the "chief missional strategist" of the district. This is especially important in the work related to new church development. In paragraph 419 of the BOD, it states, *"the district superintendent shall oversee the total ministry of the clergy (including clergy in extension ministry and ministry beyond the local church) and of the churches in the communities of the district in their mission of witness and service in the world."* The paragraph continues with, *"In the framework of their supervisory responsibilities, superintendents shall offer support, care, and counsel to clergy concerning matters affecting their effective ministry"* (BOD, 419.6). *"The superintendent shall seek to be in regular contact with the clergy on the district for counsel and supervision, and shall receive written or electronic reports of the clergy's continuing education, spiritual practices, current ministry work, and goals"* (BOD, 419.7).

In relationship to new church development, and in cooperation with the boards/committees and Office of Congregational Development (OCD), the district superintendent facilitates the implementation of work-based learning, while providing support that enables the planter to engage in project activities. The DS will work in cooperation with the boards, Coach, and the OCD in support of our church planters, taking the lead in the supervisory and oversight role.

<u>The Professional Coach:</u> Coaching Role

A professional coach that is assigned by the Office of Congregational Development shall work to support identified goals, related to a specific new church development project and with a specific church planter. Coaching is task oriented and focuses on concrete issues, such as learning how to think strategically and developing skills. Coaching is a short-term role, designed around a specific project that is identified by the boards/committees and the OCD. It is performance driven and involves the enhancing of current skills or the acquiring of new skills. While the coach and church planter relationship shall be created and maintained with the protection of confidentiality, the coach will be required to provide feedback to the DS, boards/committees, and the OCD on areas in which specific goals and benchmarks have been set for the new church development project. Discussions between the coach and the managing stakeholders (DS, boards/committees, and OCD), and the church planter, will be focused on identified goals and not behavioral changes.

The coach, church planter, and the managing stakeholders will operate under the relationship boundaries outlined in this document. Identifying specific goals and benchmarks, length of coaching contracts, confidentiality, and hopeful outcomes are just some of the parameters that will help communicate results during the coaching process. Such examples include: Helping the church planter discover, clarify, and align with the approved project/ministry plan; Encouraging self-discovery; Elicit planter-generated solutions and strategies; and hold the planter responsible and accountable. The coach will provide monthly written reports to the managing stakeholders that will offer insight on how the coaching sessions are progressing toward identified goals and benchmarks, both personal and project related. It is important that the coach provide such input to the managing stakeholders to ensure progress, while at the same time maintain appropriate confidentiality.

<u>The Board Liaison:</u> Communications Role

While a new church development project is being funded and resourced by the Board of Congregational Development, a BoCD Liaison will be assigned to the church planter. The objectives of the liaison are: To improve communications and clarity between the boards/committees, the church planter, the district superintendent, and the OCD; to offer a different set of eyes on the project and provide report-backs as necessary, based on timelines and parameters of any funding/resourcing; to enable early identification of any problems or concerns raised and to support effective discussion/action to resolve such issues; and to enable early identification of developments or opportunities where the boards/committees involvement/action would advance success.

The efforts of the liaison is to foster good communications and clarity in how the boards/committees relate to the church planter and the new church development project, specific to funding and resourcing, goals and benchmarks, and progress or decline in efforts. This work can allow the planter and the managing stakeholders to continually learn and build personal and professional capacity to accomplish the mission of the church. The liaison will check in occasionally with the church planter in order to provide encouragement, answer questions, address expectations, run interference on issues, and report valuable feedback to the managing stakeholders, all in an effort to cultivate good communications.

The Office of Congregational Development: Resourcing & Mentoring Role

The Office of Congregational Development will be the primary contact for resourcing all of our church planters and new church development projects, through training, best practices, program assistance, and strategic implementation. The Director of Strategic Faith Community Development will lead this resourcing and interaction. Specific to determining appropriate resources to support a planter/project will be the activity of mentoring. Mentoring is a long-term role, engaged to cultivate stronger planters and viable projects. While coaching is task-oriented, mentoring is relationship oriented. The focus is to provide a safe environment where the planter can share whatever issues affect her/his professional and personal success. Although specific learning goals or competencies may be used as a basis for creating the relationship, its focus goes beyond these areas to include things such as work/life balance (Sabbath), self-confidence, self-perception, clarity of call, and how the "personal" influences the "professional."

Mentoring is also development driven. Its purpose is to develop the individual, not only for the current project/plant, but also for future ministry vocation. This makes the role of the mentor distinctively different than that of immediate supervisor. Consequently, the mentor will work in close cooperation with the district superintendent, particularly in determining the needs of the planter and the best strategies to encourage success. The OCD, specific to the mentoring role, will be proactive in interacting with the district superintendent, the board/committee liaison, and the coach, to best advance movement toward overall objectives, "next steps," appropriate resources, vital assessment, and a rhythm of multiplication. The OCD will provide administrative support to the planter/plant related to approved funding and designated resources, as necessary.

Ministry Plan Development
New Church Development Projects

Prepared by
Rev. Dr. William D. Gibson
Director of Strategic Faith Community Development
wgibson@pnwumc.org

Thank you for your interest in engaging in a new church development project. Church planting is an incredible adventure that requires specific gifts, skills, passion, and stamina. However, all of these items cannot find fruitfulness without a compelling vision and a comprehensive ministry plan. To help you identify the personal tools, and support an emerging vision, the Office of Congregational Development (OCD) requires each potential planter to go through an assessment process. If you have not yet contacted the OCD or been assessed for this work, please email William Gibson (wgibson@pnwumc.org) before submitting a new church development proposal.

Instructions:

Beginning January 1, 2016, the OCD and our boards/committees are requiring a consistent format for all proposals of new church development projects, which will foster ministry plan development. The purpose for this new format is two fold: 1) We want to provide a framework that offers the managing stakeholders (District Superintendent, boards/committees, and OCD) clarity in understanding the vision, intent, leadership, growth, metrics, and expectations; and 2) We want to foster the development of a good ministry plan that will support the fruitfulness and multiplication of the project.

Additionally, as an underlying work, it is the hope of the managing stakeholders to cultivate a sense of **theological entrepreneurship**. Think of a theological entrepreneur as someone who works *"to creatively exploit opportunities that reveal how our theology intersects culture in ways that put theory into action. This action centers on making disciples in a specific missional context and is deeply rooted in a grounded vision of God, which cultivates personal piety and social holiness. It happens through ministry plan development, gathering stewarded resources (people and financial support), and establishing appropriate metrics. These efforts operate within our church polity and work synergistically with civic/community programs and services"* (my working definition). Theological entrepreneurship represents a willingness for "disruptive innovation" that fosters a "build-measure-learn" movement that is risk-taking and accountable to the mission of making disciples.

It is the hope of the OCD to encourage a common language with the potential planter/planting team, to advance a more comprehensive ministry plan, and to raise the bar of expectation. In doing so, we have created a common format that will be delivered in the form of an Executive Summary. You must use this format and headers, which is outlined as follows:

> **EXECUTIVE SUMMARY: (Insert Title)**
> - **Overview**
> - **Mission Field**
> - **Supporting Vision**

- **Key Considerations**
- **Key Strategic Goals**
- **Community Impact**
- **Contact Information**

As you will notice in the remainder of this document, each main section has a list of prompting questions or instructions. These questions/prompts should become **subheadings of the sections**, which will assist in organizing your plan. **It is extremely important that each question be addressed in the proposal.**

The use of photos/images or other graphic elements (charts/graphs, illustrations, etc.) are appropriate and helpful, particularly in communicating your vision.

In order to force critical and concise thinking, particularly in naming opportunities, goals, and strategies, **each individual question is limited to no more than a 100-word response.** Please narrow your work. This will help you communicate the necessary movement from "bold vision" to "practical steps."

In a separate document, prepare a proposal, using the following format and questions as your prompt.

NOTE: All new church development projects follow the appointment cycle and will begin on July 1 of each year, unless there are special circumstances. Therefore, the sooner you complete this work the quicker all managing stakeholders (which includes the Cabinet for deployment) can assess and respond to your proposal during the evaluation process.

Ministry Plan Format & Questions:

Please answer the following questions in each category/heading. Remember, each question/prompt is limited to 100 words in your response (with the exception of listing the qualifications of yourself and your leadership team).

EXECUTIVE SUMMARY:
Document Title: "EXECUTIVE SUMMARY: (Insert Your Title Here)"

OVERVIEW:
- In brief, describe the vision you have for a new church/community of faith.
- How have you discovered where God is already stirring in the greater community, which would give rise to such a vision?
- Tell us why you feel compelled to respond to God and the unfolding vision?
- In what ways do you believe you are gifted and equipped to lead this new initiative?
  - *NOTE: Please also include your resume or CV as an addendum to this proposal*
- Tell us who is a part of your launch team and why these leaders have committed to join you in this effort?

MISSION FIELD:
- Tell us about your mission field.
- Explain your impressions of the cultural context of this new project.
- Who is your target audience and why?
- What is your proposed **strategy** for intersecting this mission field?

NOTE: While there are a number of different strategies for planting new churches, we are listing the primary strategies we hope to pursue in the GNW, with an explanation of each, so that you can determine which best fits your plan (which might represent a combination of strategies). If your strategy/model is not listed, please provide explanation when you answer the above question (see Fresh Expressions (freshexpressionsus.org) for consideration). Below are the strategies to consider and name:

1. **Multisite/Expansion/Cohort strategy:** A new faith community meeting at a new site remains part of a sponsoring church or cohort, even as they may develop a distinct staff and ministry team system. Multi-sites vary in pastoral and staffing strategies. They typically have a site pastor — who may or may not be the lead preacher/teacher/communicator at the site.

2. **Intentional Multiethnic strategy:** This strategy results in an intentionally multi-ethnic church plant that worships as one integrated body to create a unique cultural expression and reflect all groups involved. This is what the kingdom of God is supposed to look like, so why not intentionally plant churches that are integrated and inclusive? This strategy reflects the work of the Holy Spirit to bring together as one in Christ a multitude of cultural, racial, and ethnic groups.

3. **Partner Church/Multiple "Parent" strategy:** An existing United Methodist congregation (or, perhaps, several churches) serves as an anchoring, sponsoring, or partnering force in launching a new church. This could be a cluster of partnering churches or a combination of partner church(es) and another entity (e.g. a United Methodist campus ministry, retirement home, or church agency).

4. **Church-Within-A-Church strategy:** In a world of very expensive real estate, many new churches will share space with other churches (both partner churches and other collegial congregations). Existing congregations choosing to share property may find that new churches may better serve their immediate neighborhoods, especially when the new church specializes in a certain racial-ethnic culture and/or a certain generation or social group.

5. **Refocusing/Repurposing/Closing strategy:** Currently, as our church experiences decline, there are often more churches being closed (or on the verge of having to close), than there are new churches being planted. What if we intentionally chose to explore these settings as opportunities to refocus/repurpose a church/congregation as a part of something new? In this strategy, the new church begins to address the needs and culture of a community and population that may have changed significantly (or when the church has declined because of the lack of community engagement).

6. **Vital Merger strategy:** Most of the time, mergers do not truly create new churches. Two declining churches typically agree to share one facility and decline together rather than alone. However, a strategy exists that can require both of the merging churches to sell their buildings, pool the funds, move to a temporary location, find a new name, receive a trained planter, cultivate a new compelling vision, and proceed as a new church. In this strategy, leadership of the planter is critical.

7. **House Church strategy:** This may well be the oldest strategy for church planting that exists, certainly reaching back to Asia Minor in the first century, and also to frontier America when the population was very sparse. House churches are typically small, limited to the number that can fit in a home or a small meeting place. They are often lay-led, with clergy visiting to bring the Sacraments. House churches may organize into networks, akin to circuits of very small congregations.

8. **Classic Missionary strategy:** This used to be the primary strategy of our church several years ago, often referred to as a "parachute drop." However, as results indicated, it produces the least success and fruitfulness of all church planting strategies employed. And while we have all but "dropped" it from our current list of options, there are occasions, based on circumstances, experience of the planter/launch team, and/or geographic locations, where this strategy may be an appropriate option.

- Why do you believe this is the best strategy for your project?
- Where will you launch this new church/community of faith?
- Have you conducted a MissionInsite study of the area? If so, what does this information reveal to you? How do you interpret the data?

SUPPORTING VISION:

- Who will be your partners/supporters in this ministry?

NOTE: Expand on the Stakeholders, Leadership team, Non-profits, Community partners, etc.

- Expand on the timeline of your strategic plan for at least the first three years.
- How will you engage your mission field?
- What does your discipleship system look like?

KEY CONSIDERATIONS:

- How will you measure growth and fruitfulness? How will you know you are succeeding?
- What are the benchmarks you will use to determine this (e.g. worship attendance, missional engagement, small groups, new disciples, stories of transformation, etc.?
- What is your stewardship/funding strategy for the first three years? What other sources are you pursuing in your efforts to raise funds for your initial planning/launch phase(s)?
- What are your leadership development strategies? Who are in you investing in and why?
- Describe your plan for multiplication (leaders, groups, disciples, other sites/plants, etc.).
- What is your plan for securing a coach during the first year of this project? What about in year two and three?
- What training do you hope to pursue to help you prepare for the different stages/phases of church planting?
- What does your projected budget look like over the first 5 years?
- How much funding are you requesting for this project?

NOTE: Explain the usage and distribution of funds.

KEY STRATEGIC GOALS:

- Provide a list of your strategic goals for this project.

KEY STRATEGIC OUTCOMES:

- Provide a list of what you see as strategic outcomes for this project.

COMMUNITY IMPACT:

- Describe the community impact and transformation you see as a result of moving forward with this project.

CONTACT INFORMATION:

- Please provide your contact information, to include: Name, Address, Phone, Email, etc.

Questions & Submitting Your Proposal:

Again, thank you for your interest in new church development and for your willingness to share your vision. Upon completion of this proposal, please email this proposal to William Gibson (wgibson@pnwumc.org) so that it can be reviewed and distributed to the managing stakeholders.

If you have any questions, please do not hesitate to contact me:

Rev. Dr. William D. Gibson
Director of Strategic Faith Community Development
Office of Connectional Ministries
The Pacific Northwest Conference of The United Methodist Church
The Greater Episcopal Area
816 South 216th Street #2, Des Moines, WA 98198
1.800.755.7710 Ext. 334
Email: wgibson@pnwumc.org

"Measuring Ministry"
New Church Development Quarterly Report

Name of New Church Development Project: **[RESPONSE HERE]**

Planter(s): **[RESPONSE HERE]**

District Superintendent: **[RESPONSE HERE]**

Coach: **[RESPONSE HERE]**

BoCD Liaison: **[RESPONSE HERE]**

Instructions:

Please complete the Quarterly Report by entering your responses below. In the narrative portions of the report feel free to provide image/photos or other examples (as appropriate) that will help paint a better picture of your responses. Please be as detailed as possible in the numbers section, as you will be asked to link the numerical data to the emerging narrative.

Please email this report to Patrick Ferguson (pferguson@pnwumc.org) as soon as possible. Patrick will forward them to your District Superintendent, your coach, and your BoCD liaison. It is important that you provide these reports, as they are directly linked to the work of all managing stakeholders and all funding and resources.

Previous Quarter Report (NARRATIVE):

1. Describe the top life-giving moments that offer you hope and confirmation of the unfolding vision.

2. Tell us about a challenging situation (or situations) that has caused you to rethink and modify your strategies.

3. Share with us a particular outing or intentional time with your family that was renewing in multiple ways.

4. How are you doing? How are you allowing God more room in your life and journey?

5. What major component from your strategic plan did you implement or continue during this quarter, and what have been the results?

6. Provide the names and stories of three new people you have engaged during this quarter and how you were able to provide pastoral care, counsel, encouragement, and/or empowerment to these people.

7. Provide the names and stories/updates/evaluations of new (or potentially new) people for your core group or launch team.

8. Briefly share a story (or more) of transformation you have observed in the community during this quarter. This can be related to an individual, a family, or a ministry initiative (if it has not already been shared in this report).

9. Tell us of the new relationships you have established this quarter with community partners, as a part of your efforts to lead your new church (non-profits, community businesses, civic organizations, etc.).

10. Overall, how would you assess the current progress, setbacks, or stagnation? How do you believe your answer informs your "next steps" on this journey?

11. Please provide us a prayer list so that we know how best to be praying for you and specific circumstances or needs.

Previous Quarter Report (NUMBERS):

1. Provide the weekly worship/gathering attendance for this quarter (list each of the 12 weeks):

Worship/Gathering Attendance	
Week 1:	[RESPONSE HERE]
Week 2:	[RESPONSE HERE]
Week 3:	[RESPONSE HERE]
Week 4:	[RESPONSE HERE]
Week 5:	[RESPONSE HERE]
Week 6:	[RESPONSE HERE]
Week 7:	[RESPONSE HERE]
Week 8:	[RESPONSE HERE]
Week 9:	[RESPONSE HERE]
Week 10:	[RESPONSE HERE]
Week 11:	[RESPONSE HERE]
Week 12:	[RESPONSE HERE]
WEEKLY AVERAGE:	[RESPONSE HERE]

1b. What correlation can you identify with your average attendance and parts of the narrative measurements you have provided in the previous section of this report?

[RESPONSE HERE]

2. How many people from your new church/community of faith have been engaged in ministry in the greater community (outside the walls of the church) during this quarter?

Number of people engaged in ministry:	
Total number for all combined weeks:	[RESPONSE HERE]

2b. What is your impression of this engagement (is it superficial, meaningful, life-giving, etc.)? (Please elaborate)

[RESPONSE HERE]

2c. What correlation can you identify with number of people engaged in ministry and parts of the narrative measurements you have provided in the previous section of this report?

[RESPONSE HERE]

3. What has been the average giving over this past quarter?

Average giving over the past quarter:	
Total average for all combined weeks:	**[RESPONSE HERE]**

3b. Are you seeing the desired response to your stewardship/giving strategies? (Please elaborate)

[RESPONSE HERE]

3c. If not, what new strategies will you initiate? (Please elaborate)

[RESPONSE HERE]

3d. What correlation can you identify with <u>average giving over the past quarter</u> and parts of the narrative measurements you have provided in the previous section of this report?

[RESPONSE HERE]

4. How much money have you invested in ministry, missions, outreach, or causes that have had a direct impact on the transformation of the greater community you serve (excluding rent/mortgage, power, admin, maintenance, etc.)?

Money invested in the community:	
Total for all combined weeks:	**[RESPONSE HERE]**

4b. What correlation can you identify with <u>total money invested in the community</u> and parts of the narrative measurements you have provided in the previous section of this report?

[RESPONSE HERE]

4c. What kind of creative steps have you taken that would cultivate strategies that foster sustainability for your new church (fundraising (not fundraiser), partnerships, collaboration, multiplication, etc.)?

[RESPONSE HERE]

Outline of the Financial Development for a New Church Start

- These organizational steps are driven by the need to handle money.

- The first step a new ministry needs to take is to secure a GCFA Number by request through the Conference Treasurer's office
    - This puts the ministry into the denominational system and begins the statistical tracking process

- The New Church pastor can then apply online for an EIN (Tax #) in preparation for banking purposes.
    - This is done at http://www.irs.gov/businesses/small/article/0,,id=102767,00.html

- In order to open a bank account an EIN number and a treasurer should be in place.
    - Banks may require a Board resolution to do this. It is critically important that the pastor not use personal accounts to operate their ministry. There is great risk to them personally and to the ministry to do this.

    - The Conference Treasurer's office can assist with the issuing of the IRS Determination Letter establishing the ministry as a legitimate 501(c)3 organization. The group ruling letter application can be obtained from the GCFA website (www.gcfa.org).

    - Registering with the Secretary of State office may require incorporation, articles, and by-laws. Legal advice should be sought.

- Once money is being given on a regular basis, you will need to recruit a financial secretary to count and deposit the funds and report to the treasurer, who you will need to recruit to handle disbursements.

- When people are being paid honorariums a 1099 form must be filed for anyone who is paid $600 or more during the year. This is required under Federal Tax Law. Persons you hired may need to be classified as employees, which will require withholding and filing of Appropriate IRS forms.
    - If they are working regularly for the ministry, they need to also have state labor insurance paid as well. This included pastors, musicians, janitors, etc. Get a UBI from the state where the ministry is taking place.
    - Cash payments or under the table payments are not acceptable.
    - Those working in childcare can be classified as volunteers with stipend.
        - ♣ If they are minors the state may require a minor work permit for the ministry.
        - ♣ Guidelines and training should be developed to ensure a safe environment for both the children and the childcare volunteers.

- Chartering of a new church is outlined in the Discipline paragraph 259

Once a new ministry has established its own bank account, has a Financial Secretary, Treasurer, and their own EIN and GCFA number, they may submit a developed budget to the Director of New Church Starts (BoCD) that contains at least two sections: Operations and Program. The budget should show both income and anticipated expenses.

The Conference office will continue to be the salary paying unit until the end of the tax year in order to keep W-2 information correct and clear records for tax purposes. For those ministries in their second year this means that the 20% of the pastor's salary will need to be sent to the Treasurer's office so it can be included in their paycheck until the end of the tax year when they can take over the payment obligation. At that time the conference will send their portion to the local church treasurer for payment to the pastor. Part of the Board of Congregational Development' support for your project is intended for program expenses. It would be best if those funds weren't used for the Pastor's salary or other expenses. The 20% reduction in salary support each year should be made up through tithes, offerings, and outside financial support. This will preserve program funds for the critical needs of the new faith community.

Program expenses and donations to the ministry will be transferred to the local church once the stipulations in paragraph #2 are met. Unspent balances will carry over into subsequent years and be part of the local church budget.

Gifts and tithes from the pastor while the conference is the salary paying unit need to be done post payday as we are not set up to track giving of this kind for multiple entities in our payroll system. The BoCD staff will be tracking gifts to the new ministries and be able to provide giving data for gifts that come through the Conference Office.

An annual local church audit as outlined in The Discipline will be required of new church starts once they enter this stage of their development.

Once your ministry begins to meet regularly in your home or some other space, we need to have an address and description of the space in order to ensure that our insurance carrier is properly notified and coverage is provided. If you rent space and need a certificate of insurance showing your coverage, please contact the Treasurer's office or our broker directly.
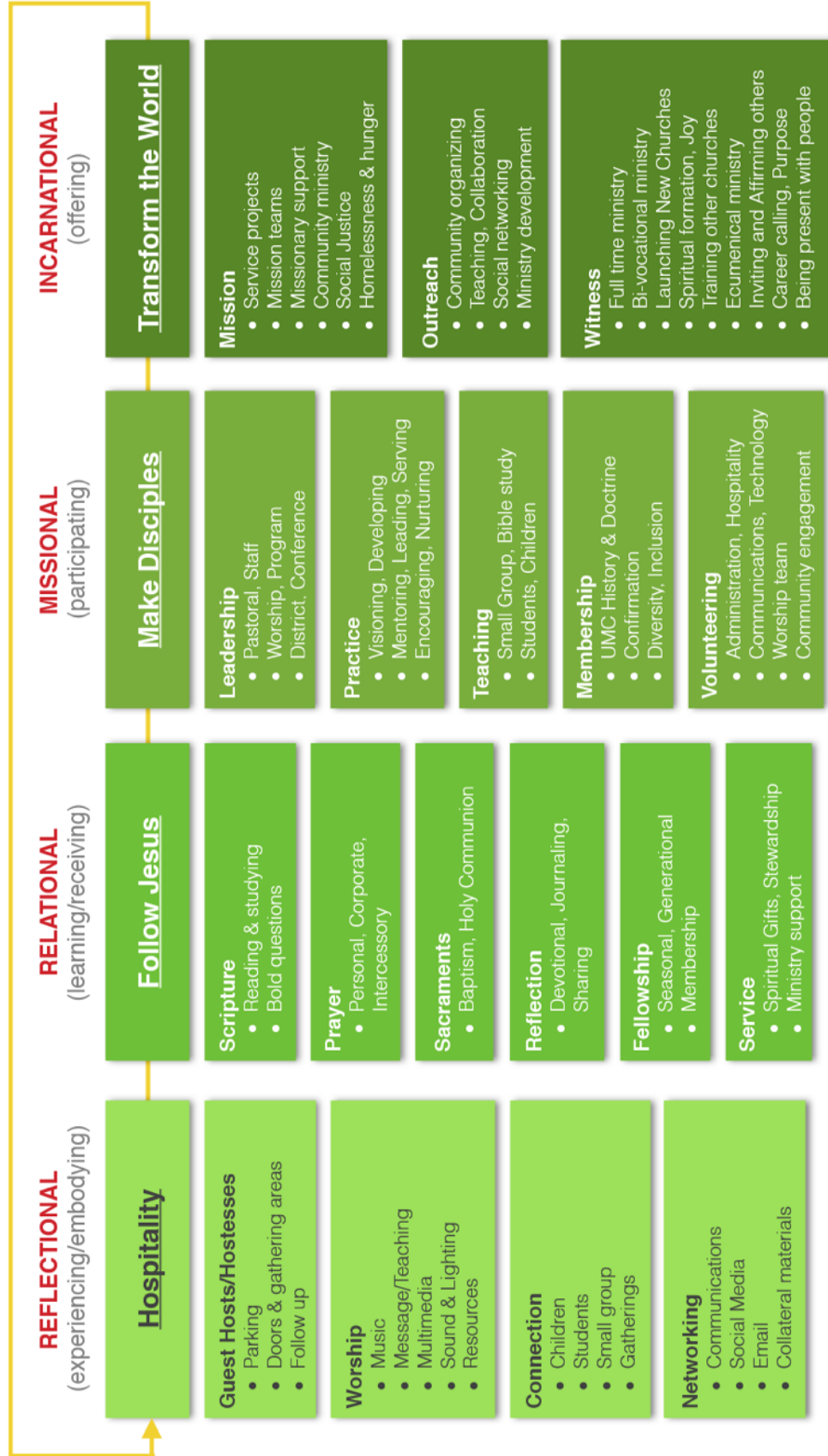
Development of Christian Community

HOW?

The development of Christian community is a reflection of Evangelism and Discipleship becoming one.

First Time Guest → **Fully Devoted Follower of Christ**

REFLECTIONAL (experiencing/embodying) — Hospitality

Guest Hosts/Hostesses
- Parking
- Doors & gathering areas
- Follow up

Worship
- Music
- Message/Teaching
- Multimedia
- Sound & Lighting
- Resources

Connection
- Children
- Students
- Small group
- Gatherings

Networking
- Communications
- Social Media
- Email
- Collateral materials

RELATIONAL (learning/receiving) — Follow Jesus

Scripture
- Reading & studying
- Bold questions

Prayer
- Personal, Corporate, Intercessory

Sacraments
- Baptism, Holy Communion

Reflection
- Devotional, Journaling, Sharing

Fellowship
- Seasonal, Generational
- Membership

Service
- Spiritual Gifts, Stewardship
- Ministry support

MISSIONAL (participating) — Make Disciples

Leadership
- Pastoral, Staff
- Worship, Program
- District, Conference

Practice
- Visioning, Developing
- Mentoring, Leading, Serving
- Encouraging, Nurturing

Teaching
- Small Group, Bible study
- Students, Children

Membership
- UMC History & Doctrine
- Confirmation
- Diversity, Inclusion

Volunteering
- Administration, Hospitality
- Communications, Technology
- Worship team
- Community engagement

INCARNATIONAL (offering) — Transform the World

Mission
- Service projects
- Mission teams
- Missionary support
- Community ministry
- Social Justice
- Homelessness & hunger

Outreach
- Community organizing
- Teaching, Collaboration
- Social networking
- Ministry development

Witness
- Full time ministry
- Bi-vocational ministry
- Launching New Churches
- Spiritual formation, Joy
- Training other churches
- Ecumenical ministry
- Inviting and Affirming others
- Career calling, Purpose
- Being present with people

Additional Resources from Discipleship Ministries and Path1

The following documents/booklets are available for download at http://www.umcdiscipleship.org/about/resource-booklets or by way of email (or our website resource page) from the Office of Congregational Development. While some of this information has been filtered into this orientation booklet for contextual application, you may also find additional, helpful information for your project/ministry.
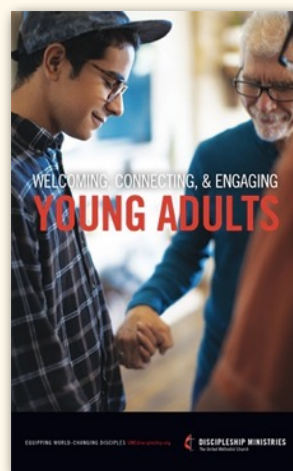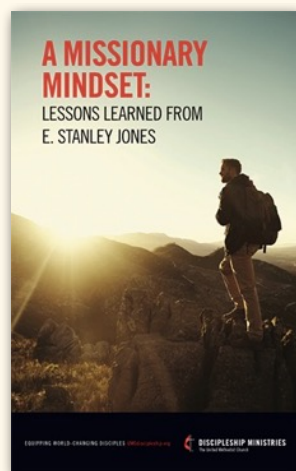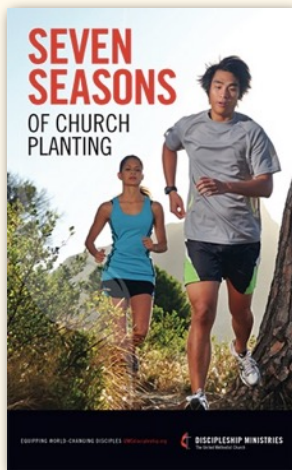
"Creating new places for new people..."

NORTHWEST ADVENTURE

Alaska Conference
The United Methodist Church

Oregon-Idaho Conference
The United Methodist Church

Pacific Northwest Conference
The United Methodist Church