

Issues Raised by United Methodists of Eastern Pennsylvania Response from The Extended Cabinet

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STRATEGIC DIRECTION

1. Lack of clarity of the mission and where we are going.

The mission of EPA states – *We will recruit and develop transformational leaders to make disciples of Jesus and grow vital congregations for the transformation of the world.* The mission focuses on developing leaders to make disciples and grow vital mission congregations who engage in world transformation. Effectively carrying out the mission will lead to more lay and clergy leadership, more new disciples, healthier congregations and more witness, justice and mercy ministries in our communities.

We are focusing on this mission at this time because we are experiencing the following.

- Declining congregations.
- We are behind our peer conferences in growing vital mission congregations.
- In the last several years our retirement of elders who pastor congregations, compared to new elders, is 5 to 1.
- New disciples, from professions of faith, have declined by 55%, Church/Sunday school by 60% and baptisms by 54% over the last 10 years. Mission participation grew by 43% over that same 10-year period. The mission of EPA focuses us on the important mission aspects of EPA, recruiting and developing transformational leaders, new disciples, vital mission congregations and community engagement.

2. Lack of clarity of how the mission connects with God.

After Jesus' death, the body of Christ lived on through the church. A vital mission congregation continues the ministries, power and wonder of the church Christ birthed through his death and resurrection found at the end of the story of Pentecost found in Acts 2:41-47. The mission of EPA connects with the greatest Commandments, the Great Commission, Pentecost and the New Testament Church.

3. Lack of clarity of how we will achieve the mission and goals.

The mission has four components. The following explains how we will achieve the mission and goals.

- a. Recruit and develop lay and clergy transformational leaders. The Leadership Academy will bring together existing leadership development ministries, and will build on and supplement these ministries to create effective leadership to serve congregations and ministries. Leadership is key to our future fruitfulness. Also, clergy recruitment is essential for EPA. EPA ranks 10th of the 10 conferences in the Northeastern Jurisdiction in clergy under 35 years of age. We have only ordained and commissioned 4-6 clergy over the past several

years, while clergy retirements are four times that number. Mosaic Ministries will begin to recruit more clergy for EPA.

- b. Make disciples of Jesus Christ. We are making fewer new disciples. One section of our Leadership Academy will be dedicated to forming and growing disciples of Jesus Christ.
- c. Grow vital mission congregations. The Pathways initiative along with the Leadership Academy and Engage will grow the health and vitality of our congregations. We want to grow from 25% to 60% of EPA congregations being considered vital. Vital Congregations follow the Acts 2 model and tend to be healthier and more vital than those that are not focusing on the five core components of vitality.
- d. World transformation. Ultimately, changing lives, communities and the world is the calling of a congregation. We have one Pathway, community engagement, that is dedicated to transformational ministries with the people in our communities.

4. Not enough input from others about the strategic direction.

We are committed to providing opportunities for both clergy and laity to engage in the strategic direction, which emerged based on survey results from over 400 responses in the fall of 2021. The survey revealed that laity and clergy wanted EPA cabinet and staff to focus on growing congregations, developing leadership and supporting congregations in their connection with the wider community. Further, Bishop Schol and staff met with more than 20 groups and individuals representing varying opinions, congregations and experiences and asked them, “What do you value and appreciate about EPA what are the challenges of EPA, what are your hopes for EPA, and what changes would you like to see in EPA?”

All of this input was utilized for the strategic direction. A group of people representing different agencies and constituencies reviewed and modified the proposed strategic plan. It was further reviewed by the Connectional Table; and two pre-Annual Conference sessions were held to receive questions, further input and feedback.

The strategic direction represents the input and hopes of a broad-based group within EPA and is an opportunity for EPA to focus on core priorities. We welcome further feedback as we continue to refine our focus. We will be working as an Extended Cabinet to engage in conversations with clergy and laity throughout 2023-2024. We understand that input from voices across EPA is essential to maximizing our impact, and we welcome your feedback as we seek to focus on key priorities for the Annual Conference.

5. Too much change, too fast.

We understand that the pace and amount of change have been significant. We know that we need to communicate the steps toward transformation better, make space for input and feedback, and continue to report on the progress made on our goals. As you have suggestions about how we can best assist you with changes, please contact your superintendent or the Director of Connectional Ministries.

There are two areas where change has been focused: finances and direction.

Finances

We must change budget and funds policy because of the following reasons:

- a. The Book of Discipline requires the Annual Conference to approve all income and expenses for clergy support (pension and insurance), all benevolences and programs, all administration and staff. In essence, all conference income and expenditures must be approved.
- b. Also, because we have not had a consolidated budget, agencies responsible for certain income and expenditures--CFA, the Benefits and Trustees boards, and program agencies--have not been aware that designated funds for other purposes were being used to balance their budgets and budgets in other areas. We must provide greater transparency in reporting income and expenses.

- c. We are required to have a funds policy. The Annual Conference is the body to designate the funds and how they are to be used.

This requires a new budget format, showing all income and expenditures, in order for the Annual Conference to determine the different funds and use of those funds. This new format requires significant changes.

Direction

We are encountering significant ministry and mission challenges. Continuing as we have been would only create deeper challenges and an unsustainable EPA mission. Please see our statistical report that tracks membership trends, provided by EPA's Conference Statistician Paul Bernhardt: [2022 Statistical Report](#)

We are only adding 3-5 provisional and full members in the pastoral ministry track each year. We are not making enough new disciples and calling enough people into ministry to advance the EPA mission. This is a challenge other conferences in our region also face; and it will mean fewer bishops to serve the Northeastern Jurisdiction. Further, we are not focusing sufficiently on the health and vitality of our congregations. EPA is seventh in vitality measures among the ten conference in our region.

The strategic direction refocuses us on congregations' health and vitality. It also aligns our people, resources, reporting and budget procedures on growing our congregations and developing the lay and clergy leadership to lead our congregations. This also invites collaboration across conference boundaries to maximize our efforts through teamwork.

The financial and directional changes are not changes that the church is used to. These types of changes are systemic, deep, comprehensive and transformational.

It is not a surprise that people feel there is too much change and it is too fast. EPA is not the only one experiencing this. The Northeastern Jurisdiction, is in a time of deep change that is impacting every annual conference in the US. The Baltimore-Washington and Peninsula-Delaware conferences are in an affiliative relationship. In addition, Western PA, Susquehanna, and West Virginia are working in affiliation.

When he was assigned to lead EPA, Bishop Schol was asked to lead collaboration efforts between EPA and GNJ by the NEJ College of Bishops, with support from the Jurisdictional Committee on Episcopacy. Seven of the ten conferences in our region are affiliating, as opposed to merging, and it is anticipated that the other three will be included in the coming years.

AFFILIATION WITH GREATER NEW JERSEY

1. Why are we affiliating with GNJ?

Amos 3:3 "Can two people walk together without agreeing on the direction?" (NLT)

The current realities across the denomination reflect the need to connect and collaborate for the furtherance of the gospel and the mission and ministry of the Church. In EPA, as we prepare for the future, we recognize the advantages of connecting and working together with a sister conference to share resources, ideas, staff, insights, information and proven initiatives. Affiliation enables us to unite as believers and disciples of Jesus Christ and to fulfill our call to carry out the Great Commission together.

EPA and GNJ have differences and similarities, each possessing the knowledge, experiences and skills to mutually strengthen the other. Each conference must discern how to maintain its uniqueness and identity while sharing and collaborating for the good of the whole. We are the Body of Christ. We share an intentional focus on developing

transformational leaders, which results in more vital congregations, more community outreach, and a broader and wider Christian movement to transform the world.

2. It feels like we are headed for a merger.

We are not headed toward a merger. A merger can only happen if both the EPA and GNJ individually approve a merger. We are not encountering any desire to merge. The EPA Extended Cabinet, including the bishop, are opposed to merger for a number of reasons. Most functions between the two conferences will remain distinct and separate, such as pension programs, finances, health insurance and property insurance.

3. Our affiliation appears to be all GNJ; and the only thing of EPA seems to be the name of NEWSpirit newspaper and the Digest.

We did not do a good job of uplifting the qualities, abilities, leaders and God-given graces that exist in EPA. We did not do a good job of including our leaders who have designed, planned, led, and presented annual conferences down through the years. This conference session was not perfect, but it was expressive, filled with holy conferencing and time for worship and the fellowship of believers (especially since this was our first in-person Annual Conference since the pandemic). It was distinctively EPA.

Affiliation is not assimilation. We neglected to emphasize the details of all that EPA is contributing to the affiliation. For instance, the Rev. Dawn Taylor Storm is the Assistant to the Bishop for both EPA and GNJ; and she leads the regional resourcing for both EPA and GNJ. Jo Fielding oversees our database management and technology for both conferences. The Rev. John Colman is the Editorial Manager for both conferences. Lindsey Cotman is the graphic designer for both conferences. The new Episcopal Office administrative assistant, who we are in the process of hiring, will be an EPA staff person working in the EPA office. EPA Camp & Retreat Centers will host camping programs for both conferences. GNJ is utilizing our policies and work on sexual ethics and training. **And EPA is providing a leadership training and support model that can help congregations in both conferences prepare better for cross-racial/cross-cultural pastoral appointments.**

Many of our members have served in conference ministries and on committees for years. They have worked diligently to develop strategies and proven initiatives under the guidance of the Holy Spirit that have and will enable this conference and GNJ to move forward together. This should not be overlooked or diminished. Collaboration enables us to keep the good in EPA and add the good in GNJ. It is not either/or. The mission of EPA came out of EPA, and we can and will fulfill that mission. We don't have all the answers or all the resources, but the Body of Christ is complete with all we need for the work. Together, EPA and GNJ can utilize what we have and elevate, through continued strategizing and training, our level of success to a place of excellence.

We seek to keep in view the small areas of the picture, while also looking at the whole landscape. Your input and feedback along the way are critical to our fruitfulness. Our omniscient God sees it all, and we trust that God will lead and guide us for the divine will and glory.

4. What are the benefits of affiliation?

What can we do better together than we can do on our own? Some of the benefits and possibilities of affiliation are financial savings, increased capacity, clergy appointments, leadership development, connectional ministries and pathways, shared human resources, camping and retreat ministries, youth ministries, Hope and Wholeness centers, and progress in ending the sin of racism.

THE BUDGET

1. How can we better understand the budget?

Over the next two months we will go deeper into the purpose, rationale and workings of our finances and budget through videos, FAQ's and informational sessions. While we all wanted to complete the budget at the Annual Conference session, the special session provides more time for people to understand the budget.

2. Why is the budget format being changed, and why are we including all income and expenditures?

It is Disciplinary for the Annual Conference session to approve a wholistic budget that shows the full income and expense for administering a conference's operations and programs. The budget belongs to the full conference and not to an agency or group. By showing the budget in this format, we are able to see all the finances in full transparency with nothing hidden. This type of budget is considered a best practice for non-profit organizations.

3. Why was the substitute budget presented during debate ruled out of order?

That substitute budget proposed only one portion of a conference budget: the Connectional Ministries portion. According to our Book of Discipline, we are required to approve a full budget.

4. Will this mean fewer people overseeing and managing the budget?

This budget format provides for more people overseeing the budget! Each area will have a manager who will have the ability to oversee their own area, make appropriate changes as needed, and ensure they are staying within their budgetary boundaries.

FUNDS POLICY

1. Why aren't our present funds policies and procedures sufficient?

We don't currently have a complete, documented set of policies and procedures for managing designated and restricted funds of EPA. A Funds policy is required by The Book of Discipline. This policy would prevent incorrect use of funds and provide a basic standard for minimum and maximum distributions. It would set goals for amounts that, once achieved, could fund specific areas without putting more of a burden on churches through apportionments.

This would prevent us from spending down our corpus and allow us to plan for the EPA Conference's mission and ministry for future generations.

2. What will this funds policy accomplish?

This policy provides a means for funding ministry for future generations. Funds have titles that reflect the use of the fund, as well as descriptions, goal amounts, distribution amounts, and monitors for oversight. The goal of each fund is to make it self-sustaining so that we can mitigate the rise of our apportionments to local churches. It puts the monitoring of funds into the hands of the Annual Conference, provides better checks and balances, and ensures a more transparent view of conference finances as a whole.

ANNUAL CONFERENCE EVALUATION

There was significant appreciation for many aspects of the Annual Conference session, including worship and music, quality of videos, the pre-conference workbook, some of the pastoral moments offered by Bishop Schol, the ordination service, the preaching, the pre-conference materials and registration, the cultural sensitivity and use of technology in materials and presentations during the Annual Conference session.

The following are some of the concerns raised.

1. Heavy use of GNJ Staff.

We understand that there are some apprehensions regarding the extensive involvement of the GNJ staff during EPA's Annual Conference. We want to assure you that this decision was made with the best intentions for the benefit of the conference and all its participants. EPA was understaffed in May, lacking sufficient persons to handle the many responsibilities involved in managing an Annual Conference session. GNJ staff volunteered to help. They were not paid for their time there.

The affiliated Communications staff and Cabinet assisted with both the EPA and GNJ Annual Conference sessions. Our collaboration was planned to contribute the expertise and commitment of GNJ staff to enhance EPA's proceedings and outcomes. We believe their involvement added a valuable dimension to our planning, discussions and actions. However, we take your concerns seriously. Our aim is to ensure that any collaborative efforts are balanced and in line with the expectations of conference members.

Two GNJ individuals preached. But EPA staff have also contributed to leading the GNJ Annual Conference.

2. Too many people from GNJ in the band.

The members of the band were chosen by the EPA session's lead musician, the Rev. Dr. Lydia Munoz, for their talents and diversity. The band had six participants; only two were from GNJ. The same band also led the music at GNJ's Annual Conference.

3. Assurance that EPA identity will be maintained.

We understand and acknowledge that any changes, even those designed for improvement or growth, may lead to apprehensions about potential shifts in identity. All of our initiatives, collaborations, and strategic decisions are made to maximize resources in order to further EPA's mission. Together, we want to augment work that we do share, while concurrently affirming the individuality and spirit that defines EPA. Going forward, we commit to keeping all lines of communication open, inviting ongoing input, and ensuring our actions consistently align with the expectations of our valued members. Together, through open discussions and collective decision-making, we will fortify our growth and advancement while preserving the unique character of EPA.

4. Not enough Latinx participation in leadership.

Throughout the Annual Conference, six instances were identified where Latinx lay and clergy members led. These included: providing leadership in worship and music; delivering a report; giving a testimony during an ordination ceremony; reading Scripture; preaching during the memorial service, and leading in prayer. Increasing Latinx involvement in leadership roles and in Annual Conference sessions remains a key priority for the Cabinet and EPA leadership.

5. People do not feel heard.

At the heart of our shared ministry is the belief that every voice matters. Each member of the EPA brings unique insights and experiences that enrich our collective understanding and further our mission. The diversity of voices within our community is a strength we deeply cherish. Your feedback brings to light the need for improvement in our communication processes. We want to assure you that we are taking this matter to heart. We are committed to listening deeply so that our members feel their thoughts and ideas are truly valued and considered.

6. Too much focus on race.

The work of Jesus is to, “preach good news to the poor, to proclaim release to the prisoners and recovery of sight to the blind, to liberate the oppressed, and to proclaim the year of the Lord’s favor.” (Luke 4:18-19 CEB) Racism is a sin that perpetuates poverty, imprisons, and oppresses. As the body of Christ, we are called to address systemic injustices and advocate for a world where love and respect for all is the norm. Ending the sin of racism is a God-sized vision, and EPA will seek to live out our call to resist evil, injustice, and oppression in whatever forms they present themselves. Please note that we strive for balance in addressing all the pressing matters that impact our community and society at large. Your feedback will be instrumental in shaping the agenda for our future conferences. While we will continue to address relevant societal issues, we will also ensure a holistic approach to our discussions, integrating diverse topics that reflect the concerns and experiences of our broad church community.

7. The bishop over-engaged in the Annual Conference session.

The bishop recognizes and understands this concern, and he has committed to monitor his own engagement. Also, there were critical moments when the bishop's pastoral engagement and wisdom may have helped, such as in the budget presentation since EPA has not been budgeting according to The Book of Discipline and best non-profit practices. EPA has not had the benefit of a clear, strategic direction and measurable goals for some time. The Extended Cabinet recognizes the value of thorough explanations and more engaged discussion during our Annual Conference. In the future, we will endeavor to provide more context and facilitate discussions that allow for deeper understanding and participation.

8. Voting Methods:

The voting methods used at this Annual Conference session were the same as used in all sessions when we are not voting for delegates to General and Jurisdictional conferences. There were a couple of votes that totaled approximately 60/40 or 55/45. The bishop, conference secretary and conference lay leader must all agree on close votes; and when they do not, a count is taken.

9. Video Presentations

The intention behind playing produced videos during breaks was to provide informative and engaging content. However, your feedback suggests this wasn't as effective as intended. We will reevaluate this approach and explore alternatives to better utilize video resources and break periods.

10. Provision of Tables and Water

The comfort and convenience of our attendees are top priorities for us. We are also committed to fostering community throughout our Annual Conference. We will continue to work to achieve an experience that provides for the full care of all guests.

11. Seating for Voting Process

Clarity is vital during any voting process, and we apologize for any confusion regarding seating during voting. We will work on clearly defining and communicating seating arrangements to ensure a smooth and transparent voting process in the future.

12. While the Ordination service was profoundly uplifting and resonated with meaning, the level of preparation for the Memorial service was not as anticipated.

We understand the deep significance of this service as a time of remembrance and honoring, and we apologize if it did not meet your expectations this time. Please be assured that we take your feedback seriously. It has always been our endeavor to ensure that every aspect of the conference is conducted with the utmost respect and preparation. Your comment underlines the importance of rehearsing and preparing more rigorously for such solemn occasion. We are committed to making improvements based on your feedback. We will review our planning and preparation processes for future memorial services to ensure they are conducted with the reverence and attention to detail that they deserve.

13. A motion was presented on Day 2 in the morning that lacked a sponsor and did not follow the process to be included.

The motion presented was sponsored by the Eastern PA Conference Chancellor. The Agenda Committee met early on the morning of May 18 to approve adding the motion to the agenda as the first item of business to be considered by the Annual Conference.