



IV

A PLAIN ACCOUNT OF
THE STRATEGY, WORK
AND PROCESSES OF THE
**INNOVATION
VITALITY TEAM**

OF THE GREATER NORTHWEST AREA
OF THE UNITED METHODIST CHURCH

Report to the Alaska, Oregon-Idaho and Pacific Northwest Conferences

March 2021

On September 16, 2020, the Innovation Vitality (IV) Team published its 2020 report online, just prior to annual conference sessions held for Alaska on September 17, Oregon-Idaho on September 18, and Pacific Northwest on September 19. In response, lay and clergy members of all three conferences signed and delivered a letter to leaders of the Pacific Northwest Conference during the presentation of the 2021 budget. It raised “concerns regarding the lack of financial transparency” in the IV Team report. Jan Kallshian, chair of the Conference Council on Finance and Administration (CF&A), reported “receiving a letter signed by a large number of clergy/laity from across the Episcopal Area,” regarding budget, transparency, and mission associated with the Innovation Vitality Team’s work. On behalf of CF&A, Jan Kallshian agreed to report first steps toward a response within 30 days, and a full response within six months. (2020 PNWAC Journal, page H-5). Because the IV Team’s work is area-wide and signers came from all three conferences, Bishop Stanovsky convened an area-wide team to respond to the letter.

SEPTEMBER LETTER
([CLICK HERE](#))

The Aspiration of this Report

This report responds to the letter’s concerns in two ways. The first response, addressed to the signers of the letter, offers concise answers to the three specific requests in the letter. The second engages in a broader, deeper discussion of the challenges, origins, vision, strategy, processes, learnings, adaptations, funding, supervision and accountability of the IV Team as it promotes vital ministry throughout the Greater Northwest. Representatives of the bodies that oversee and approve the work of the IV Team have taken responsibility for preparing this report. These include members of the cabinet -- Bishop, a Director of Connectional Ministries, Treasurers, IV Team directors, District Superintendents -- and chairs of the Alaska Vitality Team, Oregon-Idaho’s Congregational Development Team and the Board of Congregational Development in the Pacific Northwest.

For years much attention and energy have been consumed in intra-church battles over which neighbors Jesus would have us embrace, and which love Jesus would have us recognize and bless. Yet in this time the conferences of the Greater Northwest have also turned their sights and resources toward bold new engagement with the real lives of neighbors and neighborhoods.

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LIST OF SUPPLEMENTS [\(click to view\)](#)

- Text of September Letter
- Timeline
- Project Detail
- Learnings
- Resources for All
- Financial Documents:
 - Vitality Funding Introduction
 - GNW IV Team Financial Report
 - 2016-2020 GNW Project Funding
 - Coaching Program Report
 - Multiplying Ministries Report
 - Nonprofit Guidelines

Concise Responses to Three Requests in the September 2020 Letter

To the writers and signers, Kindred in Christ:

Response team work

Since October 2020, the team appointed to respond to your letter has been conducting a thorough review. We recognize and affirm your support for the essential work of innovation and vitality in the Greater Northwest Area and share your investment in its success.

Your letter spurred a deep-dive look at the history and current functioning of IV work, and at its connection with the ministry and oversight structures of the Alaska, Oregon-Idaho, and Pacific Northwest conferences. We hope this report -- likely more extensive than you envisioned -- will provide insight, inspiration, and accountability information to a broad audience, affirming that the work of innovation and vitality is central to the thriving of the United Methodist Church in the Greater Northwest Area.

In this briefer response we focus on the concerns raised in the main body of the September letter.

Financial accountability

- Because Innovation Vitality Team funding and expenditures are subject to the budget processes, financial controls, and audit requirements of the three conferences, there is a lot of detail. The Excel document linked here provides full information area-wide and broken out by conference. As requested in your letter, this includes 2020 budgets and expenses and 2021 budgets.

GNW IV TEAM FINANCIAL REPORT
([CLICK HERE](#))

- Additional documents detail funding sources for projects and provide an introduction to area-wide financial arrangements.
- More information is in the Governance and Finances section below.

Request to revise IV Team 2020 report's financial section

- For the first time in 2020, a consolidated financial report and budget covering IV work in all three conferences was provided in the IV Team Annual Report. This is now a permanent part of the conference journals as presented, and there is no practical way to revise it six months later
- The 2021 IV Team budget details linked to this response and the following report will be made widely available

Moving toward area-wide oversight and support of IV work

As a step forward:

- The bishop will convene an area-wide project funding summit meeting this spring to
 - hear and respond to recommendations of the IV Team and cabinet for New Projects and Vitality Projects.
 - cooperatively develop a funding plan for approved projects
- Members of the response team will draft a proposal to come to the 2021 annual conference sessions, creating a Greater Northwest Vitality Council, assembled and appointed by the bishop to
 - Provide consistency in accountability for IV work across conferences (request #3 of your letter)
 - It will be asked to develop a legislative proposal for long term area-wide oversight of vitality work in the GNW.



Conclusion

This brief response has addressed questions #1 and #2 in the September letter, and our full report covers many of your stated concerns. The list of questions added by signers (under question #3) is varied, and not all can be answered at a distance from particular situations and anonymous questioners. You will find that some are addressed in the report to follow. Some will require problem-solving conversations with those directly involved.

May our work and yours bear good fruit, with God's help.

Bishop Elaine JW Stanovsky, Greater Northwest Area, The United Methodist Church

Rev. Dr. Leroy Barber - Director of Innovation for an Engaged Church

Erin Day - Chair, Alaska Vital Church Project Team

Laurie Day – OR-ID Director of Connectional Ministries

Rev. Mark Galang - Puget Sound Missional District Superintendent

Rev. Dr. William Gibson - Director of Innovation for a New Church

Kristina Gonzalez - Director of Innovation for an Inclusive Church

Brant Henshaw - PNW Conference Treasurer

David Reinholz - PNW Conference Board of Congregational Development, Chair

Rev. John Tucker – OR-ID Conference Congregational Development Team, Interim Chair

Rev. Daniel Wilson-Fey – OR-ID Conference Treasurer



Cultivating Vital United Methodist Ministry: the Risk and Challenge of Leading through Liminality

The mission of the Church is to make disciples of Jesus Christ for the transformation of the world by proclaiming the good news of God's grace and by exemplifying Jesus' command to love God and neighbor, thus seeking the fulfillment of God's reign and realm in the world.

United Methodist Book of Discipline, 2016

The United Methodist Church was declining.
Doing more of what we had always done did not work.
We needed to learn a new way of being church that engaged
new people . . . young people . . . more diverse people.
The Innovation Vitality Team has evolved to help the Greater Northwest Area
invest in vital ministry through deep change and innovation.
Some experiments fail or fall short.
We are learning and improving as we go.
We are seeing good outcomes.
It is worth the risk.

Bishop Elaine J. W. Stanovsky

The urgent concerns of the letter are familiar to the wide circle of individuals and groups that share responsibility for vitality work within the GNW. They capture a snapshot moment in an evolving, continuing process. Resistance, opportunity, and challenges have characterized nearly every step. This is normal in a liminal season. The letter does not account for the learning, adaptation and innovation that has already occurred, that is currently in process, and anticipated in the future. The manner in which the letter was developed, circulated for signature, and presented creates the mistaken impression that this work is in crisis, which it is not.

CHALLENGES, LAMENTATIONS AND, AFFIRMATIONS

1 IRRELEVENCE AND DECLINE

Challenge

The church that thrived during the postwar baby boom years lost relevance and meaning amid generational, cultural, and demographic shifts over the past 50 years. The long-term future of a local church cannot be “keeping the doors open” by recruiting “more new blood,” where new people are viewed as fuel for a declining church. Churches need to turn themselves inside-outward to engage new people and communities that experience different spiritual and social yearnings than our churches currently address. For the church to be vital, its people must experience, share, and live the gospel in a way that is relevant and life-giving to people who struggle with the meaning and challenges of their lives.

Without a bold strategy and commitment to cultural transformation, we are destined to continue the long pattern of struggle and decline. Yet there is no roadmap for turning from decline to growth.

Lamentation

We lament that The United Methodist Church has lost relevance to peoples’ real lives and influence in the public sphere. Because of this, power to save lives and transform the world has been diminished.

Affirmation

The IV Team is leading the church into new and renewed relationships with neighbors and neighborhood concerns, by bold leadership development and investment in bold experiments -- both New Projects and Vitality Projects within existing churches.

2 RESISTANCE

Challenge

Many churches tried new styles of worship and music, hoping that this would attract new people like them to keep the church healthy. But vital ministry requires moving out of the church family and building, and moving toward other people who are different, younger, older, more progressive, more conservative, from different races, nationalities, ethnicities, gender and sexual identities and expressions.

For “settled” people and pastors, this does not come naturally. Most pastors and lay people are not prepared to lead the journey from bondage of the past to promise of the future. Many are better prepared to comfort the people in the dis-ease change brings, than to lead and encourage them to embrace the change

Lamentation

We lament that as neighborhoods, generations and cultures shift, many churches resist change, even when they are experiencing rapid decline.

Affirmation

Three practices guide the initiatives of the IV Team to help lead congregations toward vitality: *Inclusion, Innovation and Multiplication*. These practices shape both New Projects and Vitality Projects in existing congregations. They also inform training for leaders of existing churches for the culture change and community engagement that are essential to a new season of vital ministry.



3 RACISM, PRIVILEGE AND EXCLUSION

Challenge

Our members and leaders are overwhelmingly white. Women are not on equal footing with men in leadership in the church. The official position of The United Methodist Church continues to exclude LGBTQ+ persons from full participation and ministry. The vast majority within our churches express a desire to be inclusive of a full diversity of persons, but do not recognize the ways in which their own attitudes and actions are rooted in historic white supremacy and privilege. As Christians we have not done our spiritual self-examination to recognize white privilege, male privilege and hetero-normativity in ourselves and our churches. We must develop the intercultural competence necessary to form humble, respectful, equitable, mutual relationships with people in the diversity of race, ethnicity, gender and gender identity or sexual orientation.

Too often, predominantly white congregations that receive the appointment of a BIPOC (Black, Indigenous and People of Color) innovator, planter or pastor exhibit disrespectful, critical, demeaning attitudes toward the pastor, in which race plays an evident role.

Lamentation

We lament that our churches and The United Methodist Church as a whole are shaped by and in turn perpetuate institutional racism and other systems of privilege and exclusion.

Affirmation

Recognizing and dismantling systems of privilege and marginalization in churches and our church systems is at the heart of Jesus' commandment that we love our neighbors as ourselves. The IV Team has put "Inclusion" at the top of the three practices of a vital church. To promote this practice within the church, the team is proactive in recruiting, training, and deploying BIPOC leaders in New Projects and Vitality Projects. Recruiting diverse leaders will not transform the church as long as existing congregations are not ready to receive and work with them. Leading the church to become fully inclusive is a priority for conference leadership, led significantly by the IV Team, bishop and cabinet, and communicators.

4 RISK-TAKING

Challenge

Adaptive change is a process of taking risks on experiments, learning from them, adjusting, evaluating what works, and repeating the process over and over. How does a Church in decline and focused on self-preservation learn to take risks, knowing that many will fail, but trusting that some will thrive, touch and change lives, and bless communities? How does the church grow in its ability to embrace unproven, higher risk, experimental initiatives that are necessary to make gospel promises real in the lives of new and diverse neighbors in a time of rapid cultural change? How do we develop a culture and system that upholds and celebrates leaders who take the risk to innovate, whether or not their particular project thrives?

Lamentation

We lament that many initiatives fail or flounder, causing self-doubt and discouragement among staff, participants, funders, and the conferences. We lament that leaders who courageously step into risky, innovative projects may feel personal failure if their project does not reach its goals, is defunded or discontinued, though we understand that failure is part of the adaptive process.

Affirmation

The Conferences of the Greater Northwest Area have recognized the need for this systemic change and prioritized financial and staff resources toward experimentation and innovation to promote vital ministry. Many gifted clergy and lay leaders, both within The UMC and recruited from outside are called to this challenging work as “planter/innovators,” either in existing churches or in New Projects to cultivate ministry where none was before. Each potential planter/innovator undergoes an assessment process to discern whether they are well-suited to this evangelistic work. If chosen, they become part of an ongoing system of training, coaching, supervision, and peer support.

5 DISRUPTION AND ADAPTATION

Challenge

Adaptive change is an iterative process that is not easily managed, planned, or predicted. There is no blueprint for a process that requires repeated cycles of innovation, experimentation, failure, evaluation, and adaptation. Changes in systems of communication, supervision, accountability, and finance inevitably follow and often lag behind innovation, creating rough places and gaps in the organization. Gaps occur between the work of initiating something entirely new and clearly explaining the construction-in-progress to those not immediately involved. Adaptation of processes and structures to support new ministries and their leaders inevitably lag behind learnings that emerge from innovative projects and conference leaders have not always clearly communicated administrative processes, timelines, and expectations to the persons involved in the innovation work, the governing boards, the cabinet, or the conferences at large. The challenge is for conference leadership to share with stakeholders on a timely basis as the adaptive process unfolds, emerging information about

1. The vitality model
2. How innovation projects are initiated, evaluated and ended
3. How funds are allocated or discontinued
4. How leadership is assessed, deployed, supported and evaluated
5. Learnings along the way
6. The metrics for evaluating the costs and benefits of conference investments

Lamentation

We lament that creating something new sometimes requires disrupting existing systems and creating new systems to make room and provide support for what is emerging. These very real growing pains in an organization may include unclear or shifting expectations, inadequate communication, insufficient preparation and support for congregations and leaders involved in a new project, and administrative supervision and accountability that is either too demanding or not demanding enough. We lament the confusion, that in the messiness of these shifts trust has eroded, and people have suffered.

Affirmation

The letter presented to the Pacific Northwest Annual Conference in September 2020 expresses support for a new season of vital ministry within the Greater Northwest Area. It also surfaces doubts about whether the administrative, financial, and supervisory systems for vitality initiatives are adequate, and whether the outcomes are worth the investments of human and financial resources. We affirm the request for more information with which to understand, participate in and evaluate this work.

Background of Greater Northwest Vitality Work

Area-wide vitality efforts have emerged from separate work in three conferences – Alaska, Oregon-Idaho, and Pacific Northwest – before 2012, the year when the three conferences were joined in the Greater Northwest Episcopal Area. Sharing of staff for congregational development and church planting was formalized in 2015, as Rev. Dr. William Gibson began as staff in the Pacific Northwest, joining Rev. Steve Ross, staff in Oregon-Idaho. Ms. Kristina Gonzalez was identified as the third team member in 2017. An Associate Director of Strategic Faith Community Development was added in July 2017 to manage the expanding workload (Rev. Shalom Agtarap, 2017-2019).

By early 2018, with the hiring of Rev. Dr. Leroy Barber, what is now known as the Innovation Vitality Team began working across the working across the GNW Area. These leaders crystallized a Vitality Model and Change Strategy, building on discussions underway since 2016. The IV Team was formally introduced at all three Annual Conferences in 2018, with presentation of the Vitality Model and Change Strategy (to be known later as the Vitality Strategy and Change Theory). Inclusion, Innovation and Multiplication became the guiding vitality strategy across the GNW Area, led by the IV Team. Their assigned work included planting new faith communities (New Projects), and Vitality Projects connected with existing churches. The cycle of innovation and learning was expected to yield new insights and resources useful for any congregation seeking new vitality.

A BRIEF TIMELINE
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Vitality Strategy and Change Theory

The Vitality Strategy and Change Theory that is being tested through the work of the Innovation Vitality Team asserts that ministry will thrive when practices of Inclusion, Innovation and Multiplication are robust in the life of faith communities — new or existing. What do we mean by these terms?

Inclusion

In United Methodist circles and perhaps in the current parlance of denominational life, the word 'inclusion' has focused on the struggles to fully affirm LGBTQIA+ laity and clergy in life of the church. While this is an important part of inclusion, it is not the full story. "Inclusion means recognizing, celebrating and incorporating the many cultures present in the Greater Northwest Area," says Kristina Gonzalez, Director of Innovation for an Inclusive Church. Across our vast geography, inclusion presents different challenges in different locations. All of our churches occupy ancestral lands of Native peoples who are present in urban, rural, village and reservation communities, but under-represented in church membership and partnerships. Urban areas (Anchorage, Boise, Portland, Seattle, Spokane, and Tacoma) tend to be the most culturally diverse communities, including people from cultures and nations around the world. However, fishing, agriculture, and industry in this four-state region (Alaska, Idaho, Oregon, and Washington) outside of the urban areas have attracted immigrant communities for years, some of which represent generations of Latinx, Pacific Islander, and Asian/Asian American communities. In these varied settings vital congregations will:

- Welcome the diversity of their communities in worship attendance and leadership.
- Adapt their worship and ministry expressions to speak to the diversity of their settings (including generational differences).
- Adapt their decision-making processes and administrative life to allow for multiple communication and decision-making styles.
- Build partnerships across differences for the good of the community as interpreted by the community.

Innovation

Innovation happens at the intersection of difference, according to Rev. Dr. Leroy Barber, director of innovation for an engaged church. In faithfulness to the gospel of Jesus, a congregation must develop among its people the curiosity, humility, and resilience to encounter difference productively, and identify the opportunity for ministry in the encounter. This involves being attuned to the changing culture of the community, understanding that culture is in constant flux. While culture fluctuates, the gospel remains a relevant guide for how congregations engage the world.

“Our theological task is constructive in that every generation must appropriate creatively the wisdom of the past and seek God in their midst in order to think afresh about God, revelation, sin, redemption, worship, the church, freedom, justice, moral responsibility and other significant theological concerns. Our summons is to understand and receive the gospel promises in our troubled and uncertain times. (United Methodist Book of Discipline, 2016, page 81)

Jesus led and enlisted leaders from the margins of society. He invested in people who were messy, poor, oppressed, and egotistical. In so doing, he invested in leaders who could speak with authenticity in their communities. Likewise, vital congregations must be willing to learn how to welcome and affirm leadership that will take them to the margins – not only as a liberating activity for those on the margins, but also for those of greater power and privilege. Vital congregations will:

- Understand that God is already at work in community and strive to join that work.
- Seek relationships across differences and learn from those differences.
- Invite and follow younger and more diverse leaders in order to learn from them (as opposed to molding them to their likeness) and inform the intersection between the church and its work in the world.

Multiplication

Thriving congregations must act as midwives by identifying and growing leaders, strategizing mission, and supporting risk, according to Rev. Dr. William Gibson, IV Team Director of Innovation for a New Church. Churches can and must develop income sources beyond the offering plate to sustain vitality in the future. Strategic missional partnerships with other non-profit organizations, cooperative space sharing, theological entrepreneurship, social enterprise, and compatible business models will be the norm for vital congregations. A culture of appropriate risk-taking and assessment will allow congregations to determine what to expand and when to bless and close ministries that have run their courses. Vital congregations will:

- Foster disciples who foster disciples.
- Identify leaders who identify and grow leaders.
- Establish congregations that launch new places with new people.
- Take appropriate risks for the sake of the gospel.
- Assess ministries for continuing relevance and bless and close those no longer relevant.
- Sustain their growth through multiple sources of income.



Projects and Learnings

Learning from projects

The work of cultivating new life and vitality is a cycle of creation, implementation, and learning. What is learned from each project – including those that close after a time -- is available to guide the selection and development of new ones. It also shapes the evolving structures of support, resourcing, and oversight. An extensive Learnings Supplement is provided with this report.

Measuring practices and projects

The three vitality practices inform the creation, selection and development of Vitality Projects (within or connected to existing churches) and New Projects (breaking new ground separately). And they are the foundation for evaluating all activities and initiatives of the IV Team, though measuring these practices presents some challenges.

As projects are planned and launched, project-specific benchmarks are developed. During the life of a project, performance toward benchmarks is tracked as part of the on-going supervision of planter-innovators and projects. Performance toward benchmarks provides data analysis, evaluation, learning and adjustment or discontinuation of projects.

Multiplication is the most easily measured practice and is the metric upon which a project is determined to continue or end. Financial sustainability is a must, but not necessarily through traditional means like tithes and offerings. Projects must show the creativity to connect in their contexts, sustain themselves and continue community impact over time.

A source of new, vital and diverse leadership

The IV Team has developed an intentional leadership pipeline to recruit and deploy Black, Indigenous and People of Color from both inside and outside The United Methodist Church as appointed or assigned congregational leaders in the Greater Northwest. Inclusion of these innovators as colleagues and friends in our United Methodist family invites and challenges us all to grow in our intercultural competence. Since 2018 outreach, recruitment, and assessment by the IV Team have brought a significant number of new leaders into the United Methodist Church in the GNW Area. Of the 37 ongoing projects, 21 (or 58%) are led by leaders of color. Rev. Dr. Leroy Barber tells the story in this video:

WATCH VIDEO
(CLICK HERE)

Current Vitality Projects and New Projects

Currently active projects as of February 2021 are listed here. A list with brief descriptions is provided in the Project Supplement.

Alaska Conference

No.	Projects	Planter/Innovator	Classification	Year of Origin
1	Every Nation	Murray Crookes	New	2018

Oregon-Idaho Conference

No.	Projects	Planter/Innovator	Classification	Year of Origin
2	Las Naciones	Jorge Rodriguez	New	2015
3	The Rockwood Center	Steve Lewis	Vitality	2017
4	Boise First Amity Campus	Rob Walters	Vitality	ongoing
5	Southeast PDX Parish	Eilidh Lowery	Vitality	2017
6	Storydwelling	Erika Spaet	New (Multiplication)	2017
7	Great Spirit UMC	Allen Buck	Vitality	2017
8	Bold New Season	Josh Clark	New (Multiplication)	2018
9	Twin Falls UMC	Buddy Gharring	Vitality	2018
10	Parkrose UMC	Andru/Regina Morgan	Vitality	2019
11	Tabor Heights UMC	Nicholle Ortiz Forrest Nameniuk	Vitality	2019
12	Sunnyside/The Groves	Sunia Gibbs	New	2019
13	New Meadows/NW Abbey	Jon Umbdenstock	Vitality	2019
14	Beloved Community PDX	Karen Ward	New	2019
15	Beaverton First UMC	Jefferson Chao	Vitality	2019
16	The Cultural Soul Project	Daymond Glenn	New (Hub)	2019

Pacific Northwest Conference

No.	Projects	Planter/Innovator	Classification	Year of Origin
17	First UMC of Canada	Bing CanlaSteve Lewis	New	ongoing
18	El Dios Viviente	Gerardo Guzman	Vitality	ongoing
19	Valley & Mountain: Ravenna	Neal Sharpe	New (Multiplication)	2017
20	Sunnyside	Joel Rodriguez	New	2018
21	Redeemer UMC	Jim Davis (Int.)	Vitality	2017
22	Orting UMC	Alexa Eisenbarth	Vitality	2017
23	Haven Fellowship	Zach Taylor	New	2017
24	Creators' Table	Katy Shedlock	New (Multiplication)	2017
25	North Community	Steve Michael	New (Multiplication)	2017
26	SPAAC Church	Thomas Yang	New	2017
27	Marysville: Better Together	Kate Kilroy	New (Multiplication)	2018
28	First UMC Canada: Squamish	Norman Feliciano	New (Multiplication)	2018
29	Steamboat Island Fellowship	Heather Sparkman	New (Multiplication)	2018
30	Tacoma Hub	Shalom Agtarap	Vitality	2019
31	Seattle: Creative Communities	Danielle Elliott	New	2019
32	Acts On Stage Fellowship (Hub)	Michelle Lang-Raymond	New (Hub)	2020
33	South Park Community Church	Coté Soerens	New	2020

LEARNINGS
(CLICK HERE)

PROJECT DETAIL
(CLICK HERE)

Processes for Projects and Planters/Innovators

IV Team initiatives to promote new vital United Methodist ministry in the Greater Northwest Area have two parts: identifying settings where inclusion, innovation and multiplication are possible and strategic; and identifying planter/innovator leaders who have the capacity to develop and lead new vital ministry. Processes for assessing planter/innovators and for choosing projects have evolved significantly over time, in a spirit of continual learning and improvement. This section briefly describes current practices.

How projects are originated and chosen

The IV Team works with each district superintendent (DS) to identify strategic locations, both for New Projects and for Vitality Projects in existing churches. As the “chief missional strategist” of the district, each DS determines if a project is to be pursued, considering the assessment of the IV Team.

An individual or congregation can propose a project to their DS. Then the DS consults with the IV Team about the potential opportunity. The DS may ask the IV Team to conduct a preliminary evaluation of the potential of any proposed project.

Assessment and selection of planter/innovators -- annual cycle

Potential planter/innovators are identified through two streams — through their DS or through IV Team recruitment efforts. Anyone can ask to be assessed as a potential planter/innovator and will be considered for entry into an extensive assessment process. The assessment process is completed in February of each year to coincide with the cabinet’s appointment-related work.

This process has been changed and improved each year since its inception in 2015. The current Leadership Identification Process is the most robust yet, consisting of an individual leadership assessment, video interview, questionnaire, and assessment team interview, all designed to assess candidates on a continuum between ‘planter/innovator’ on one end and ‘pastor/shepherd’ on the other. The assessment team is composed of IV Team members, district superintendents, Board of Congregational Development/Congregational Development Team/Vitality Team representatives, and at least one planter/innovator. In addition to identifying leaders for New Projects and Vitality Projects in existing congregations, this continuum model has been used by the GNW Cabinet in the ordinary appointment process to match gifts of pastors with specific strategic appointments in existing churches.

Matching of projects and planter/innovators

In some situations, a potential planter/innovator is assessed without a particular project in mind, or a project may be planned without a leader identified. When a person is assessed as a planter/innovator and recommended for a potential New Project or Vitality Project, the IV Team collaborates with the DS for possible placement, and then brings a recommendation to the appropriate board or team for funding and project approval. The board or team in each respective conference considers the recommended concepts, locations, and funding models. If approved at this level, the planter/innovator and project are recommended to the GNW Cabinet for discernment and deployment.



Resources for All

It is not possible for the IV Team to be personally involved in the vitality efforts of more than 400 local churches, or to directly support every innovative leader. The IV Team focuses its work with identified New Projects and Vitality Projects that have the approval of district superintendents and vitality governing boards. However, Inclusion, Innovation and Multiplication are essential to vital ministry in every setting. All pastors and lay leaders are responsible for keeping ministry relevant, vibrant, and engaged with its neighbors. The IV Team and the learning from projects have produced valuable resources for use in any church. These range from trainings, revivals, webinars and events (some recorded for ongoing use) to congregational handouts and study materials, demographic research tools, articles and videos -- all of them relevant in our Greater Northwest ministry contexts. These have been promoted through events in every district, conference websites, blogs, and other channels. The Resource Supplement of this report offers a comprehensive catalogue of resources developed to date.

[RESOURCES FOR ALL](#)
(CLICK HERE)



Governance and Finances

Innovation and vitality work requires support, oversight, and coordination from the governing structures of three conferences. These governing bodies' roles are cited throughout this report. As the only other major area-wide body, the GNW Area Cabinet currently works closely alongside the IV Team. This is the place IV Team directors, district superintendents, conference treasurers and directors of connectional ministry, most regularly ensure open communication and collaboration. A consolidated listing is provided here for clarity, and to show the primary lines of accountability. Financial processes are described in documents linked below.

Governing bodies currently involved in Innovation Vitality work

The three annual conferences have ultimate responsibility for the work of the IV Team. They each fund IV team projects, programs, and personnel through adoption of the Conference budgets, recommended by conference councils on finance and administration. They have each authorized and elected a governing board to guide, support and hold accountable the IV Team and its work between annual conference sessions.

- In Alaska, the Vitality Team (VT), which reports to the Leadership Team.
- In Oregon-Idaho, the Congregational Development Team (CDT), which reports to the Ministry Leadership Team.
- In Pacific Northwest, the Board of Congregational Development (BOCD), which reports to the Connectional Table.
- GNW Area Cabinet (9 district superintendents, 2 treasurers, 3 directors of connectional ministry, and 3 IV Team directors, under the oversight of the bishop) consults and collaborates on New Projects and Vitality Projects as they develop.
- The bishop and district superintendents appoint or assign planter/innovators to New Projects and Vitality Projects through the annual clergy deployment processes.
- District superintendents supervise clergy and lay-assigned persons in their districts, including those in New Projects or Vitality Projects. They make project recommendations and recommend potential planter/innovators for assessment. Superintendents collaborate and coordinate with IV Team where appropriate.
- Annual Conference treasurers disburse budgeted funds; manage cost sharing across conferences; provide for annual audits.

Supervision and accountability of IV Team directors -- an evolving structure

Before 2012 vitality work in the Greater Northwest Area was led by separate staff and/or volunteers in three conferences working independently of one another, under the supervision of two bishops. The creation of the Greater Northwest Area in 2012, bringing the three conferences under the oversight of one bishop, opened the way for collaboration across conference lines. Over time two directors expanded to three directors and several other dedicated staff positions, striving to work as a team across the area. Each of the three directors is an employee of one of the conferences, with a relationship to that conference's director of connectional ministries. At the beginning, the supervision and financial side of these arrangements were informal and negotiated on a case-by-case basis. But over time, more and more costs became shared between the three conferences.

The cabinet began to question how the work could be done across conferences in a more intentional and robust way. It was through conversations at the cabinet level that the first iteration of the change theory was hatched – a 'three-legged stool' including intercultural competency, support for vitality in existing ministries, and new expressions of United Methodist theology across the area. Staff was already in place to carry out these functions: Ms. Kristina Gonzalez, then Director of Leadership Development for an Inclusive Church; Rev. Dr. William Gibson, Director of Strategic Faith Community Development; Rev. Stephen Ross, Director of the Vital Church Project. These persons were members of the GNW Area Cabinet as configured by Bishop Stanovsky when she entered this complex system in 2016. As the time neared to launch the concept of area-wide staff for vitality, Rev. Ross left his position and returned to local church ministry in 2017, setting in motion a search process leading to the hire of Rev. Dr. Leroy Barber, a Baptist pastor, proven innovator, and mentor for emerging leaders of color.

Vitality staff continued to expand with Rev. Shalom Agtarap, followed by Dr. LaVerne Lewis serving as associates with Rev. Dr. Gibson; Mr. Patrick Ferguson providing support to Ms. Gonzalez and Rev. Dr. Gibson; Rev. Dr. Jess Bielman as associate to Rev. Dr. Barber, with Ms. Naphtali Renshaw providing staff support. This team came to be known as the Innovation Vitality Team (IV Team).

Financial arrangements became more complicated and difficult to track and manage. Each staff person was still hired and employed by one of the conferences, though they began to function more and more as a team. Conference treasurers and DCMs tried various methods for supervising staff and equitably sharing costs. All of them were complicated, difficult to interpret, and unsatisfactory. Gaps in understanding and communication led to misunderstandings and disputes. Supervision of shared work across three conferences by three separate boards became impossible. Governing boards became less active and engaged.

Financial and governing structures did not evolve at the same rate as operational reality. Each conference continues to have a governance structure, and a financial system that is independent of the others. This has resulted in an overly complex and convoluted process for moving projects from the drawing board, through approval and funding, to initiation. There were many miscommunications along the way. And, as the vision and activities became more and more area-wide, the importance and energy for separate conference boards wavered. In 2019 the bishop required the cabinet, including the IV Team, to improve communication and collaboration, in order to create a space where key conference leaders were shaping culture-shift together. This was an important adaptive change that improved alignment of key leaders, communication, and identification and resolution of conflicts and problems.

All the while, a new season of vital ministry, engaged with new people -- younger, LGBTQ+, and racially and ethnically diverse people -- blossomed.

Also, in late 2019 the cabinet, including the IV team, acknowledged that the level of harm, chaos and failure within innovation projects had become intolerably high, as it became impossible to manage the volume of innovation projects. In response, the IV Team slowed the rate at which projects were launched. Communication and cooperation between IV Team staff and district superintendents increased. Administrative procedures were changed to provide "higher touch" with planter/innovators, with quicker identification and intervention when serious problems developed. The cabinet made a commitment to participate in intercultural competency training at every cabinet meeting, which continues today.

As cabinet level staff, the IV Team directors are supervised by the bishop of the GNW Area and accountable, severally, to the area-wide Team, the annual conference governing boards, and councils on finance and administration. Functionally, the presence of IV Team directors at the cabinet table includes them in relationships of collegial accountability and cooperation, which are vital to the multi-faceted nature of their work.

District Superintendent roles

As the chief missional strategists of their districts, the district superintendents recommend projects and collaborate with IV Team staff at all stages of project development. The Discipline – geared to established churches and their pastors – expects each DS to supervise clergy and oversee congregations in the district. Thus, they have formal supervisory responsibility for clergy and other planter/innovators, and oversight of Vitality Projects and New Projects in their districts.

Given the specialized needs of planter/innovators and the unique nature of each project, the supervision and support a busy DS can provide is not sufficient. By necessity, a practice of shared supervision with IV Team staff has developed over time. This has caused uncertainty and confusion, with planter/innovators sometimes unsure where to turn for support. Inclusion of the IV Team directors on the GNW cabinet has improved communications. A helpful distinction between administrative supervision (DS) and resourcing (IV) has been articulated. This area will need continued attention.

Process of budget development, allocation to conferences, financial management and reporting

- Budgets are developed by the IV Team and presented to the respective agencies within conferences (the Leadership Team in Alaska, the Ministry Leadership Team in Oregon-Idaho and the Connectional Table in Pacific Northwest) who review, adopt and forward to the Council on Finance and Administration for inclusion in the Annual Conference budget.
- Once budgets are adopted, the IV team releases funds and authorizes expenditures, which are paid by the Conference Treasurer. All expenditures are subject to the authorization processes, financial reporting, and annual audits of the respective conferences.
- In recent years the conference treasurers, working with the IV Team, have made tremendous improvements in developing protocols and formulae for sharing costs equitably among the three conferences for area-wide work.
- For the first time in 2020, the IV Team Annual Report presented a consolidated financial report covering the work in three Annual Conferences, based on data from the treasurers' offices of the conferences. This was a response to requests for a big-picture view. While this report gave an accurate overview, it did not satisfy some readers' desire to see their own conference's funding sources and expense details. The linked documents below provide that information.

VITALITY FUNDING INTRODUCTION
(CLICK HERE)

**GNW IV TEAM
FINANCIAL REPORT**
(CLICK HERE)

**2016-2020 GNW
PROJECT FUNDING**
(CLICK HERE)

**COACHING
PROGRAM REPORT**
(CLICK HERE)

MULTIPLYING MINISTRIES REPORT
(CLICK HERE)

Moving Forward -- Area-Wide Governance

Much has been learned by doing in recent years – what works in various settings, what hasn't worked, what gets in the way of vitality, what fosters it. We are building on that knowledge. A dedicated team of IV directors and staff has labored to create space for new leadership and vital ministries to emerge. This is the work of every ordained and lay person in every conference, district, and local church. It is the work of the church we are called to be.

Yet it is not easy to unite around this work. Structures designed for representation, support and accountability within conference boundaries have been coordinated and adapted to allow the IV Team to serve the whole Greater Northwest Area. This evolving complexity has produced its own impediments and frustrations. The Holy Spirit has not been deterred, but the headwinds have been significant.

To move fully into the promise of innovation and vitality work, we believe it is time to begin the next phase of more productive planning, oversight, ownership, and strategic development. An area-wide body is needed.

The conferences in the Greater Northwest Area have the same bishop, share a joint cabinet, have one Innovation Vitality Team, and are moving toward increased financial collaboration. It makes sense to develop a new entity to promote vitality across the area, particularly since this effort requires widespread buy-in, consistent messaging, accessibility, and accountability.

To begin this next phase, we propose the creation of a Greater Northwest Vitality Council, assembled and appointed by the bishop, to be authorized at the 2021 annual conference sessions.



Conclusion

We believe that the vitality work being initiated in the Greater Northwest Area is stronger than any prior initiative in the area -- indeed, stronger than almost any other initiative in The United Methodist Church in the United States. It is deeper, more inclusive, innovative, more likely to transform ministry in ways that transform lives, and to weave strong community engagements. This is true despite many missteps, oversights, frustrations, frictions, setbacks, and sorrows,

Can we do it everywhere all at once? No. We must prioritize resources of time, attention, training and resources for the people and places that are ready to let go of practices that produce decline, to experiment with practices intended to lead the church back into the world.

Is it risky? Yes. We are learning how to anticipate, gauge and manage risk.

Is it demanding? Yes. Planter/innovators need to have a realistic understanding of the adventure and challenge they are taking on. We need to clarify the roles of the various people and groups that guide, evaluate and support planter/innovators -- to let them know where to turn with questions and challenges, to be sure needed resources are available, and to avoid unhealthy triangulation.

Do we know how to do it well? Yes and no. We have learned a lot and improved many systems that were not serving well. And we will continue to learn and improve as long as we do this work, because each person and each setting is different, and the challenges unique to the setting.

Have some people been hurt in the process? Yes. We have much to learn about how to support planter/innovators, how to end projects well, and how to honor people who take a risk and fail.

Have we demonstrated our ability to try, learn, adapt, and try again? Yes and no. Some learnings have led to important improvements. Streamlining the complex lines of authority, accountability, and funding of three annual conferences into one system that is comprehensible and works smoothly is still an elusive goal. This is the urgent work underway now, with the hope that a new single governing Vitality Board will be approved at the 2021 annual conference sessions.

Then there will be a new challenge, and a new experiment, from which we will learn and adapt. God being our helper.

Response Team Members

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Erin Day - Chair, Alaska Vital Church Project Team

Laurie Day – OR-ID Director of Connectional Ministries

Rev. Mark Galang - Puget Sound Missional District Superintendent

Rev. Dr. William Gibson - Director of Innovation for a New Church

Kristina Gonzalez - Director of Innovation for an Inclusive Church

Brant Henshaw - PNW Conference Treasurer

David Reinholz - PNW Conference Board of Congregational Development, Chair

Rev. John Tucker – OR-ID Conference Congregational Development Team, Interim Chair

Rev. Daniel Wilson-Fey – OR-ID Conference Treasurer

