

## **Introduction**

We, the Church Transformation Process Consultation Team, would like to thank Rev. Donnie Wilkinson, clergy and lay staff, lay leadership and the congregation of Broadmoor UMC for the invitation to consult with this Body of Christ. The following observations and recommendations are the result of this team studying the following information: a) Broadmoor's self-study document provided by its leaders, b) completion of a congregational survey by the church members, c) interviews with the pastors, staff, and leaders, d) a MissionInsite demographic report of the area's population, e) input from the Faith Perceptions Mystery Guest Worshiper Report, and f) input from the focus groups and the consultation workshop.

Our prayer is that you will use this assessment experience and consultation report to help Broadmoor UMC more effectively make disciples of Jesus Christ for the transformation of your community and the world.

## **Strengths**

According to what you have told us, Broadmoor's greatest areas of strengths are:

### **1. Loving, Caring People**

The consultation team heard repeated comments about the loving nature and generous spirit of the congregation of this church. As one member stated, "the people are the best thing about Broadmoor – they care for others and the source of that is their deep love for Jesus."

### **2. Legacy of Missional Outreach**

"This is a servant church" was a sentiment shared by one member that was also echoed by many in the congregation as expressed to the consultation team through your survey responses and in interviews, focus groups, and the workshop. Ministries such as Broadmoor Elementary, Southeast Ministries and Open Air Ministry were lifted up as some examples of the congregation's heart to serve people in your community over the years.

### **3. Momentum and Renewed Energy**

The consultation team continually picked up on a building momentum and a renewed sense of energy and optimism from the congregation. We heard repeatedly that there is a growing eagerness to move forward and reach Broadmoor's full potential.

### **4. Sunday Morning Experience**

Broadmoor provides three worship experiences with both traditional and casual style options. Quality music and compelling preaching were noted hallmarks of the worship services as expressed through the congregational survey, interviews, and focus groups. The Mystery Guests also made positive remarks about the worship experience and the preaching.

### **5. Facility**

Broadmoor is blessed with a large facility and property located in a diverse community with many opportunities for outreach, collaboration, and life transformation. The consultation team affirms the congregation's achievement in paying off its building debt in full as well as the ongoing ways the church's facilities are made available for community use.

## **Concerns**

According to what you have told us, Broadmoor is poised to build upon its proud history, harness its growing new energy, and launch into a promising future. Even so, the congregation has expressed the following areas of challenge and concern:

### **1. Unifying Vision**

During our conversations and review of materials, most of the members identified versions of "Invite. Equip. Send. Serve." as the church's mission. However, the consultation team also heard you say there seems to be a lack of clarity concerning a shared vision for how the congregation plans to live out the mission of The United Methodist Church ("to make disciples of Jesus Christ for the transformation of the world") within Broadmoor's specific context. We also heard you express a desire for a clear vision for the congregation that would build on current momentum, unify the

congregation, and propel the church into its preferred future, aligning all resources for ministries, budgets, and staffing around a clear, cohesive, and action-oriented purpose. We also heard from many who stated a desire to recapture the spirit of Broadmoor's original vision to "extend the work and witness of Christ and His church in this area."

## 2. Making Disciples

- **Discipleship:** While some adult Sunday school classes and Bible study groups are offered at Broadmoor, the consultation team heard in interviews, focus groups and the workshop an expressed desire to strengthen and expand current offerings as well as develop new opportunities for deepening spiritual growth for new and seasoned believers including small group options. However, there does not seem to be a systematic discipleship plan in place by which individuals of all ages and stages of spiritual maturity can be effectively and intentionally connected into the life and mission of the church and grow in their faith. We also heard that Broadmoor lacks opportunities for new people to connect into the life of the church and grow in their faith.

### - **Community Engagement:**

The consultation team heard you express concern over the aging of this congregation as well as a deep desire to reach new people – especially younger adults and families with youth and children – and connect them into the life of the church. We also heard your hopes to find new ways to reach out and connect with the diverse population in your neighborhood and help them grow in their faith. Broadmoor has a rich history of serving in its community. While these ministries are meeting physical needs, these efforts have not always been as effective at building bridges into the community with the intentional purpose of "making disciples."

- **New Worship Service:** Your congregation received a recommendation from a previous consultation experience in 2010 that suggested the development of a 2<sup>nd</sup> "Casual" worship experience, however, action on this has yet to be taken. This consultation team affirms that suggestion. In light of the congregation's growing momentum and recent growth surpassing the 250 benchmark given by the previous consultant, the church is poised to begin the work of launching a new service. Furthermore, all existing worship experiences at Broadmoor should be viewed with the vision and mission field in mind.

## 3. Systems and Structure

**Organizational Structure:** Throughout our conversations and review of materials, the consultation team recognized a common theme concerning the lack of a clear and effective leadership structure within the church, including staff and elected leaders. The consultation team also heard you tell us that the current leadership model lacks clearly defined responsibilities and expectations. This has led to confusion, an inability for leadership to lead effectively, and concern that staff and ministries of the church operate in "silos."

**Leadership Development:** We heard many comments that there seems to be no intentional process for equipping, motivating, and deploying new and existing members at Broadmoor in servant-leadership positions. Concerns were expressed about a lack of new volunteers in many areas, and a small, rotating group of core leaders.

**Communication & Transparency:** The consultation team repeatedly heard you express a need for improved communication between the pastors, staff, leadership, and the congregation. Without addressing these concerns, the church will not be positioned for vitality and future growth. Through the congregational survey, interviews, and focus groups you shared with us that ministry and administrative areas of the church, as was previously stated, tend to operate in "silos" and therefore do not plan, work, and communicate together in an effective manner. This leads to a perceived lack of transparency by the congregation.

## 4. Finances

Through a thorough review of the materials provided by your leadership, reports from previous financial consultants, and interviews with staff and leaders, this consultation team noted the following **urgent** realities:

- An aging donor base
- Declining budget revenues
- A disproportional percentage of operating budget going toward staff salaries with no vision alignment plan
- The failure to adopt and implement Horizons Stewardship Ministry Audit
- Issues related to timely financial reporting and oversight
- Inconsistent planned giving efforts

## **Recommendations:**

### **1. Unifying Vision**

On the day this consultation report is accepted, the congregation will reaffirm the mission statement of The United Methodist Church, “*Making disciples of Jesus Christ for the transformation of the world.*” Every ministry of the church needs to have as its primary purpose “making disciples.”

**The Mission is what we do and the Vision is how we do it in this time and place.** The Pastors, in consultation with the Coach, will name a Vision Team made up of a cross-section of the congregation with special efforts to include younger people and newer members of the church. The team will be established by **November 4, 2018**. The Coach will conduct a Visioning Workshop for the Vision Team by **November 10, 2018**. The Team will clarify a shared, forward-focused vision for the church. This vision will provide accountability for the congregation to pursue its mission, aligning all worship services, outreach efforts, ministries, staffing, and resources around a common purpose. The vision will also serve as a framework for connecting with new people in the community and helping them along their faith journey. The vision statement will be completed and presented to the congregation by **January 6, 2019**.

Additionally, the Pastors, program staff, and ministry leaders in consultation with the Coach, will conduct a Ministry Review to begin the process of aligning ministries, staffing, and resources to the new vision of the church. This work will be completed by **February 28, 2019**.

### **2. Making Disciples**

- **Discipleship:** The church’s ability to grow, connect with the community, and effectively live into its mission and vision must be rooted in an intentional process that encourages existing members to grow deeper in their faith and actively invites new believers into a relationship with Christ. The Pastors, in consultation with the Coach, will name a Discipleship Team by **November 4, 2018** that includes a cross-section of the congregation with special efforts to include younger people and newer members of the church. This team will develop a clear and simple process for growing new and seasoned Christians in their faith that will include a way for new families entering the church to connect into the life of Broadmoor. This pathway will include a process for children, youth, and adults to grow in their relationship with Jesus Christ and provide connection opportunities for spiritual growth, support, and accountability that extend beyond Sunday mornings.

The team will use resources suggested by the Coach and will implement the pathway by **June 2019**.

#### **- Community Engagement:**

Attracting diverse, young adults and families into the life of an established congregation is challenging and requires an ongoing, intentional, long-term commitment on the part of the entire church. The consultation team affirms the recent efforts of the congregation as it strives to be a “wall-less church” through such efforts as the Block Party, Fall Fest, and Blessing of the Pets. The Pastors, in consultation with the Coach, will create an Engagement Team by **November 4, 2018** to explore new opportunities for the church to more effectively meet its neighbors, grow new relationships, and create a culture of invitation and consistent hospitality at the church. This team will study the Mystery Guest Worshipper report to inform its work and will then conduct a Community Assessment in consultation with the Coach by **December 15, 2018**. This team will begin the work of developing a strategic plan in alignment with the church’s new vision to create a signature ministry by **February 28, 2019** that is unique to this church, and helps bridge gaps and build relationships with the community.

Additionally, the Engagement Team, in consultation with the Coach, will work to leverage its current missional outreach opportunities to build relationships and make disciples. The Consultation Team recommends as resources for this work your Mystery Guest Worshipper Report and the book, Get Their Name, by Bob Farr and Kay Kotan.

To further cultivate a culture of invitation and hospitality, the trustees in consultation with the pastors, will conduct a building assessment and update children and youth ministry spaces to accommodate new families in alignment with the vision.

- **New Worship Service:** In consultation with the Coach, the Casual Worship Pastor will create a Launch Team to develop a plan to create a worship experience that meets the needs of the mission field and helps the church to fulfill its new vision. This new worship service will be launched by **September 2019**.

The Pastors, in consultation with the Coach, will create a process to review the effectiveness of existing worship services in light of the church’s new vision. This work will be completed and implemented by **September 2019**.

### **3. Systems & Structure**

- **Organizational Structure:** The Pastors, in consultation with the Coach, will work to include examining the leadership organization of the church, and exploring the possibility of establishing a more clear and effective church structure with well-defined roles and responsibilities. This plan will be developed and ready for implementation before **Charge Conference 2019**.

Additionally, The Pastors, in consultation with the Coach, will work with the Staff Parish Relations Committee to review job descriptions to ensure roles and responsibilities are well-defined and aligned with the vision. This work will also serve to establish an expectation for a healthy and productive work environment to maximize fruitful and effective ministry and will be completed by **November 30, 2018**.

- **Leadership Development:** The Pastors, in consultation with the Coach, will take responsibility for developing and implementing a strategy for intentional leadership development to include job descriptions, goal-setting, training, and accountability for all staff and key leadership roles in line with the church's vision. This plan will be developed and ready for implementation before **Charge Conference 2019**.

- **Communications & Transparency:** To help address the concerns about insufficient or ineffective communications and the perceived lack of transparency in the church, the Pastors, in consultation with the Coach, will develop policies and practices to facilitate the effective and timely communication to the congregation. This work will include reviewing all avenues of internal and external communications and will be completed by **November 30, 2018**.

### **4. Finances**

The Pastors, in consultation with the Coach, will name a Generosity Team to work on processes to engage the congregation in faithfully carrying out their membership vows of supporting Broadmoor with their prayers, presences, gifts, service, and witness. This Generosity Team will re-engage with the recommendations made by the Horizons Stewardship Ministry Audit and guide the congregation in the full implementation of that plan by **April 15, 2019**.

The Generosity Team will use the Best Practices of the Horizon Stewardship Ministry Audit to clearly communicate with the church and express gratitude for faithful ministry.

The Finance Committee will review expenditures and trends related to growth in the operating budget and will recommend strategic budgetary reduction to the Church Council in alignment with the stated vision of the church. Priority will be given to fully fund the stated ministry emphases of the Vision, Engagement, and Launch Teams. This work will be completed by **January 31, 2019**.

The Pastors, in consultation with the Coach, will also work to develop a clear plan to ensure timely financial reporting and oversight, and a plan for a staffing budget that more effectively aligns leadership to the church's vision. This work will be completed by **January 31, 2019**.

### **Conclusion:**

We, your Consultation Team, want to thank you for the opportunity to serve your congregation through this Church Transformation Process. Our hope and prayers for your congregation is that you will seek God's guidance and use this process to help your church become more effective and fruitful. May He give you courage and strength as together you move forward.

- Rev. Dr. Gloria Fowler, Lead Consultant & Coach
- Rev. Dr. Van Stinson
- Rev. Bernadine Johnson
- Rev. Doug de Graffenried
- Chris Spencer
- Rhonda Whitley
- Serena Eckert

### **Town Hall Meeting Dates:**

- Sun. 9/30 at 11:45 in AB 101
- Wed. 10/03 at 6:15 in Youth Build. Room 3
- Sun. 10/07 at 11:45 in AB 101

### **Church Council Vote:**

- Sun. 10/07 at 11:45 in AB 101