



AGENCY EVALUATION REPORT

Strategy, Innovation, Learning

The Connectional Table | July 2018

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INTRODUCTION AND OVERVIEW

Members of the Connectional Table (CT) Agency Evaluation Advisory Group and CT staff met in person and via video conferencing July 12-13, 2018, to conduct learning dialogues as phase two of the CT-approved agency evaluation process. The stated dialogue goals were to learn about: 1) agency ministries in the Four Areas of Focus, and 2) agency disciplinary mandates and other essential ministries. The advisory group used two dialogue formats: The Four Areas of Focus dialogue format was collaborative and multi-agency, inclusive of all agencies participating in the focus area; and the individual agency dialogues included staff and board members as appropriate for the conversation that focused on the agency's additional disciplinary mandates and other essential ministries.

The dialogue sessions were rich in learning for the CT evaluation team members as well as for agency participants. There were many examples of missional faithfulness and fruitfulness that inspired and encouraged evaluation team members and those who engaged in the dialogues for the Four Areas of Focus. The team anticipated synthesizing actionable information for consideration by the CT, the Council of Bishops/CT Strategic Team¹ and agencies from these wide-ranging dialogues. As will be addressed in the final section, the team sees the need for intentional strategies to “tell the story” so all United Methodists can celebrate how disciples are being made and the world is being transformed through our shared ministries.

The team encourages all Connectional Table members to read the agency reports submitted for these learning dialogues, which can be found in the Google Drive folder called [Agency Internal Evaluation reports](#).

¹ The Strategic Team coordinates and strategizes around the Four Areas of Focus. The team includes bishops assigned by the Council of Bishops to lead an area of focus, presidents of the boards of directors for each of the four lead agencies, general secretaries and appropriate staff from the four lead agencies, The Connectional Table chair, and the chief connectional ministries officer.

PART ONE: FOUR AREAS OF FOCUS

The Agency Evaluation Advisory Group facilitated dialogues for each of the Four Areas of Focus. Each dialogue included representatives from agencies that conduct ministry activities in that focus area. The four dialogue sessions were open conversations with full presence and participation by all agencies present. This allowed agencies to learn and see a broader scope of ministries in the Four Areas of Focus. The United Methodist Women and The United Methodist Publishing House, while not recipients of the World Service Fund (WSF), engaged in all four dialogues to share their ministry activities in each area of focus.

In phase one of the CT's agency evaluation process, the nine program agencies submitted anticipated outcomes for review in Four Areas of Focus logic models. The logic model is an evaluation tool that clearly articulates the outcomes and impacts for each agency by including data on planned activities, inputs, outputs and partnerships that are needed to achieve the stated impacts. Each learning dialogue included a review of all agency ministry offerings for the area of focus based on logic model submissions.

Since the introduction of the Four Areas of Focus in 2008, four program agencies have served as "lead agencies" to shepherd and coordinate the collaborative work of participating agencies in that focus area. In 2018, the lead agencies are as follows:

Focus: Leadership	Lead Agency: Higher Education and Ministry
Focus: New Places for New People	Lead Agency: Discipleship Ministries
Focus: Ministry with the Poor	Lead Agency: Church and Society
Focus: Abundant Health	Lead Agency: Global Ministries

Lead agencies prepared summary reports that allowed all participants to see the scope of ministries within the area of focus. Questions were developed around the CT's four values for evaluation: 1) missional fruitfulness, or outcomes; 2) continuous improvement; 3) building partnerships and 4) telling the story.

The four dialogues created a new opportunity for all agencies working in a focus area to:

- Understand how lead agencies approach their roles and responsibilities with other general agencies and the whole connection in relation to the focus area initiatives;
- Learn what others are doing in the focus area;
- See how each agency's work complements the whole;
- Celebrate the missional fruit of the collective efforts;
- Identify current and potential partnerships to enhance collaborative efforts;
- Begin to hear and record stories of how individual lives and the world are being transformed through these efforts; and,
- Consider the emerging priorities based on collective efforts and first-level evaluation.

The following agencies receive World Service funding for the Four Areas of Focus:

	Developing Principled Christian Leaders	New Places for New People	Ministry with the Poor	Global Health
General Board of Higher Education and Ministry	Lead Agency			
Discipleship Ministries	✓	Lead Agency		
General Board of Church and Society	✓		Lead Agency	✓
General Board of Global Ministries	✓	✓	✓	Lead Agency
General Commission on Archives and History	✓			
General Commission on Religion and Race	✓	✓		
General Commission on the Status and Role of Women	✓			
General Commission on United Methodist Men	✓	✓	✓	✓
United Methodist Communications	✓	✓	✓	✓

In addition, United Methodist Women, UM Publishing House and Wespath, while not recipients of World Service funding, engage in aspects of the Four Areas of Focus.

Observations & Commendations

The CT Agency Evaluation Advisory Group approaches its work with an “appreciative inquiry” framework, which strives to highlight and appreciate what is working well in order to build on these strengths. The approach engages stakeholders - in this case, program agencies - in dialogues that strive to examine evidence of successes upon which agencies can collectively build. In that spirit, the CT evaluation team notes the following **commendable observations** and expresses **appreciation** for the following efforts:

Agencies demonstrated a strong commitment to learn and work with the logic model tool as a means of collecting comparative information of ministry goals, outputs, and intended outcomes. The CT team appreciates the leadership of the general secretaries and their evaluation staffs who embraced, learned and implemented this significant undertaking.

The compilation of data and the creation of ministry categories by the lead agencies in each area of focus represents a potential strategic step forward as the UMC enters a planning phase for the next quadrennium. These categories helped bring focus to the enormous scope and scale of ministry activities being undertaken and planned. These categories could be a starting point for developing deeper strategies and identifying outcomes toward increased missional fruit.

- The General Board of Higher Education and Ministry observed three main phases of leadership development within the offerings of all participating agencies: Discover, Claim and Flourish. GBHEM grouped the various ministries into these three categories.
- Discipleship Ministries observed four main phases to creating new places for new people within the offerings of participating agencies: Evangelism, Faith Formation, Intentional Discipleship Systems and New Church Development.
- The other two areas of focus are working with the “goals and objectives” expressed by the agencies sponsoring the various ministries. Ministry with the Poor has five objectives. Global Health has ten objectives.

The creativity and faithfulness expressed through the ministries of participating agencies is inspiring. Most of the ministries are initiated independently by each agency with its constituency, based on its DNA and core mission.

The increasing evidence of inter-agency partnerships within the Four Areas of Focus demonstrates the strategic benefits of intentional and well-coordinated collaboration. One

general secretary summed up the spirit of partnership in this way: “You must purposefully decide ‘NOT’ to work with each other.” It was affirmed that the various aspects of shared ministry overlap and interconnect. Some partnerships involve shared services where the resources of one agency are made available to another agency. Other partnerships emerge when one agency has existing expertise and relationships in a region that is a new frontier for another agency’s desired work.

- Some examples of “shared services” include taking advantage of services provided by the General Council on Finance and Administration. These shared services include accounting, accounts receivable/accounts payable, personnel support, travel services and meeting planning.
- One example of agencies forging partnerships based on existing expertise and emerging ministries is the relationship between Discipleship Ministries and the General Board of Global Ministries. DM benefitted from GBGM’s existing relationships, cultural and contextual expertise, and facilities as DM sought to begin a new ministry in a region outside the US.
- The General Commission on Religion and Race offers expertise around racial and cultural diversity for agencies seeking to develop ministries in contexts and communities with whom they have little or no experience. For example, consulting with those seeking to start new faith communities or develop culturally relevant faith formation materials find this expertise helpful.

Agency leaders have begun to make use of the consolidated data and reports revealing the scope of ministry activities within each area of focus and their own internal evaluation documents. It was notable to hear examples of activities that may cease because one agency saw expertise and missional fruit in a similar offering by another agency.

- Discipleship Ministries reported that it would cease its projects around e-readers due to the General Board of Higher Education and Ministries fruitfulness and effectiveness in this important resource for ministry.
- United Methodist Communications reported that it would cease the annual program calendar based in its research that revealed ample options are available.

Actionable Information Related to Four Areas of Focus

Based on the experience of the Four Areas of Focus dialogues and feedback from agency staff and leadership, the CT team recommends the following actions:

Recommendation #1: The Strategic Team and the four lead agencies should take initiative to convene periodic gatherings (in person and/or via video-conferencing) with all participating agencies in the area of focus they are leading. There was desire expressed for lead agencies

to take initiative to coordinate and lead within a spirit of partnership. There are future benefits to more collaboration, strategic planning and even more robust inter-agency partnerships.

Recommendation #2: Continue to increase strategic collaboration around the categories and goals among the participating agencies for each area of focus. There is power in a shared process around which each agency can see their ministry offerings contribute to the overall effort. This will also contribute to “telling the story” in a way that all agency stakeholders can appreciate and support.

Recommendation #3: Continue analysis and deliberation by each agency on how its resources might be reallocated internally to generate more fruit-bearing initiatives when one or more agencies is already conducting similar, substantive ministry activities. If ceasing a ministry does not seem prudent due to an agency’s core ministry, the team strongly urges developing deeper partnerships to maximize the available resources and potential impact.

Recommendation #4: The team observed that some ministries seem to have been included in an area of focus when perhaps it was not necessarily aligned. The team encourages agencies to feel the freedom to not list ministries in an area of focus unless the ministry activity is a comprehensive and substantial offering in that strategic area. It might be better to ask which of the areas of focus an agency’s core mission is most naturally and predominately aligned—and list the core ministries in those few areas.

Recommendation #5: Continue using the logic model tool as a standard means for collecting agency outcomes in the Four Areas of Focus. Maintaining the same tool, with some negotiated refinements, will add even more benefit to the planning and evaluation process in succeeding quadrennia. The CT engaged the services of an evaluation consultant. We can use such consultants in the future to offer coaching and expertise as the evaluation process evolves and each agency’s evaluation capacity increases to maximize missional fruit.

PART TWO: INDIVIDUAL AGENCY DIALOGUES

As part of phase two, the CT team also met with each agency receiving world service funds.

The conversations included questions seeking to:

- Understand the disciplinary mandates and other essential ministries carried out by the agency;
- Learn about the agency approach to and capacity for conducting evaluation for missional fruitfulness; and
- Provide agency leaders an opportunity to communicate details and nuances related to their specific agency they felt important for the CT to know.

Several observations emerged from these dialogues with the leaders from the nine agencies that receive world service funding. The observations focus on the topics of the dialogue questions.

Observations on Disciplinary Mandates and Essential Ministries

Disciplinary mandates and essential ministries pre-date the Four Areas of Focus. These ministry activities give historic shape and core purpose for each agency. While there is no opposition to the Four Areas of Focus, they fit more naturally within the scope of some agencies than others.

Agencies are engaged in the ongoing process of re-evaluating the language and strategies expressed in their disciplinary mandates and essential ministries. Some current disciplinary language is representative of a past era that is not generating as much missional fruitfulness. These agencies will work with their boards of directors to propose legislation for General Conference 2020 to modify those portions of *The Book of Discipline*.

- Discipleship Ministries and United Methodist Communications are among the agencies that anticipate submitting petitions to General Conference 2020, which would consolidate, modernize and express their disciplinary mandates and essential ministries in more strategic language.

Several agencies were assigned special projects by the 2016 General Conference. While the work falls naturally within the scope of the agency, these projects require tremendous

investment of human and financial resources. None of these assignments came with additional fund allocation.

- The General Board of Church and Society was assigned the task of revising the Social Principles. Discipleship Ministries was assigned the task of developing a new United Methodist Hymnal. A quick check of the legislative tracking tool revealed that both agencies submitted these petitions for General Conference consideration and indicated there were “no financial implications.”

While each agency seeks to be nimble and flexible to allow for quick response to emerging needs, some smaller agencies have been inundated by cultural crises that require significant immediate responses. This required a redirection of human and financial resources and impacted the ability to dedicate those resources to quadrennial ministry plans.

- General Commission on the Status and Role of Women had increased call volume and case management due to the “Me Too” movement, which led to what is being called a “Church Too” movement.
- The General Board of Church and Society had increased demand for its advocacy work related to the human suffering around immigration and migration issues in the U.S. and worldwide.

Evaluation Capacity

The CT team commends the growing capacity of agencies related to internal program evaluation. Agencies continue to advance organizational cultures oriented toward evaluating their ministries for missional fruitfulness. This has been a multi-quadrennium process to shift the culture toward outcomes evaluation. Formal evaluation processes have been developed and utilized in ways that place a high value on measurable missional fruitfulness or “return on investment.” The team saw increasing evidence that decision-making is being shaped by measurable data flowing out of these evaluation processes.

The receptivity to continue developing capacity within agencies with less evaluation capacity was encouraging. It was clear that they recognized the need to grow their capacity and the team commends the way all agencies have embraced the need for more advanced, measurable evaluation of its ministries. In the dialogues, participants shared testimonies of how the benefits of this quadrennium’s CT agency evaluation process have far exceeded the challenges and struggles of learning and adapting to outcome-based evaluation.

HIGHLIGHTS OF AGENCY INTERNAL EVALUATION CAPACITY

Discipleship Ministries engages in robust program evaluation of their ministries and is currently exploring ways to increase assessment of long-term impacts, without reducing their short-term outcomes evaluation efforts. The logic model tool is a key part of their process. Additional changes in evaluation process include: developing a standardized evaluation rubric and a plan to enlist staff from various divisions to help with evaluation processes; and increasing attention to behavioral change as a desired outcome of all agency work and drawing on theory to support program practices.

Global Ministries developed a robust monitoring and evaluation process that looks at its major ministries on a rotating basis. The process includes verifiable, measurable data that is closely monitored by the leadership team. There is ample evidence that GM used evaluation data to make adjustments in strategies for increased fruitfulness.

The General Board of Church and Society has taken steps in a multi-year process of improving its internal organizational review process. The new model includes improving its evaluation methods, data collection and reporting with a focus on its mission and quadrennial goals, rather than program units. They have shifted organizational priorities as a result of a communications audit in 2015 that resulted in changes for both internal and external communications, and the agency is renewing a focus on partnerships with annual conferences. GBCS continues to identify and implement evaluation tools to measure the outcomes of their ministries.

The General Board of Higher Education and Ministry partnered with the ROI Institute (return on investment) to assess each of its ministries and program activities. ROI includes the obvious financial stewardship aspect, but also gauges long-term ministry values generated by the specific program. GBHEM staff have been extensively trained in ROI and have generated enough data from this form of evaluation to begin making decisions, in part, based on anticipated return on investment.

The General Commission on Archives and History appointed a task force of the board to conduct their quadrennial evaluation using CT criteria, and GCAH employed the logic model to articulate its programmatic work in the areas of focus in collaboration with the multi-agency process. GCAH will continue to participate in ongoing collaborative efforts to improve evaluation capacity and methods appropriate for the ministries.

The General Commission on Religion and Race has worked for several quadrennia to develop its culture around evaluation. Currently, GCORR is exploring ways to revise its evaluation process so that GCORR can measure and prioritize program offerings and resources that have exponential impact rather than limited, short-term benefits.

The General Commission on the Status and Role of Women has restructured internally to include a standing Committee on Mission and Evaluation. This committee reviewed the agency's missional priorities and programs. In addition, GCSRW completed the logic model and plans to use it to develop appropriate evaluation methodologies to measure the outcomes of their ministries annually.

The General Commission on United Methodist Men continues to refine its internal evaluation process for continuous improvement of its programs and ministries. UMM used the logic model as a tool for identifying outcomes and measures that help the staff and board determine the effectiveness of their ministry efforts. GCUMM leadership is committed to developing evaluation methods that foster increased effectiveness and fruitfulness.

United Methodist Communications has in place a comprehensive, results-oriented evaluation. Research drives everything, UMCOM says. It informs the programs and resources developed for the whole UMC and the particular agency-partners for whom the resource is being developed. Research is then used to evaluate the results and to inform the next set of decisions.

Actionable Information Emerging from Agency Dialogues

One of the desired outcomes from the learning dialogues was for the evaluation team, in cooperation with all dialogue participants, to synthesize information for actionable steps. The following topics emerged for further consideration by the CT. The advisory group refers these items to the CT Executive Committee for further discernment.

Leading Edge Strategic Conversations

In the course of the dialogues, agencies made suggestions about the role the CT might play in fostering “leading edge” learning and strategic conversations among all agencies and other entities. The CT is in a unique place within its structure to facilitate conversations that:

- Lead to the development of shared strategic goals/missional priorities,
- Help to address deep “adaptive” change that can help The UMC better realize its vision for vitality,
- Explore ways in which the whole connection can better live into its identity as a worldwide church as expressed in paragraph 125 of the Book of Discipline, “Integrally holding connectional unity and local freedom, [seeking]...to proclaim and embody the gospel in ways responsible to our specific cultural and social context while maintaining ‘a vital web of interactive relationships,’” and
- Explore ways for all leaders to be stewards of the unique theological contributions of the Wesleyan way of sharing the gospel.

Telling the Story: Communicating Missional Impact

The team recommends that the CT work in partnership with United Methodist Communications to convene agencies, including agency communicators, to communicate the overflowing stories of transformed lives and a transformed world through the collective, shared ministries of The United Methodist Church. Many examples were shared of faithful, creative, sacrificial and

transformational work among agencies and within the Four Areas of Focus that would generate celebration among members and constituents.

Evaluation Support and Networking

The CT team received positive feedback on its coordinating and encouraging increasing the capacity of each agency to conduct non-profit, industry-standard program evaluation. Agency evaluators for the CT seemed receptive to convening periodic gatherings (in-person and/or via video conferencing) for continued learning, mutual support and clarification of the CT's evaluation expectations. Further, the CT team acknowledges that some agencies do not have the staffing and expertise to dramatically grow their evaluation capacity. Therefore, the team recommends that the CT explore the feasibility of a UMC Office of Research and Evaluation that could coordinate a multi-agency approach to evaluation policies and practices, as well as serve and support each agency as their situation dictates to provide data for decision-making that yields maximum missional fruit with all available resources.

Evaluation Process Transitions for Next Quadrennium

The CT team recommends that the current Agency Evaluation Advisory Group review the 2017-2020 CT agency evaluation process and make the recommended adjustments for the next quadrennium. The team recognizes the evaluation process this quadrennium has been created and implemented almost simultaneously, leaving little room for planning. While this allowed for a more responsive approach to the perceived needs, the timing for different phases and methods was not always optimum for agencies. As part of the review, the team recommends including discussion around the frequency of evaluation conversations during future quadrennia. A few people expressed that once a quadrennia might be too infrequent after evaluation tools and strategic conversations mature.

CONCLUSION

In closing, participants in the evaluation process came away from the various dialogues with a renewed enthusiasm and appreciation for all the good that is being accomplished within the United Methodist connection. Agencies are committed to faithfully fulfilling their core ministries and willingly partner with others to transform lives and transform the world. It is important to tell this story as we seek to care for the *“heart of our connection”* and insure the continued viability of the United Methodist witness throughout the world.

It also is crucial to recognize that the challenges before such a complex organization as The United Methodist Church are numerous, making continual improvement and adaptation necessary as we face the future. God is still calling, equipping, empowering, deploying and blessing miraculously the laity and clergy of our global church. The evidence of such divine anointing is visible and palpable for those who have eyes to see.

We invite all United Methodists to embrace anew and actively partner in our divine mission to make disciples of Jesus Christ for the transformation of the world.

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