

## Plans Towards 2010

What are the celebrations and challenges as The United Church of Canada seeks to follow and participate in *missio dei* —God’s mission—as a faithful community of Christ in the 21<sup>st</sup> century?

Gregory Baum, one of Canada's pre-eminent systematic theologians, noted in 2005 the outstanding social justice legacy of the United Church. He observed that the United Church has a greater interest in the state of the world than in its own survival and prosperity. How now, will the United Church attend to its global and social justice legacy AND survival and prosperity of its congregations and ministry leadership AND that which stretches us beyond our familiar concerns?

In June 2007, the General Secretary, General Council and senior staff find themselves on a challenging journey. The Executive of the General Council awaits plans based on the purpose discerned by the 39<sup>th</sup> General Council 2006 in Thunder Bay and the priorities named by the Executive of the General Council in May 2007.

By carefully shifting some resources, we strive to create strong, healthy congregations with solid ministry leadership and a vision of the church that reflects the young, intercultural face of Canada, conscious of its responsibility for God’s creation.

At the same time as these opportunities present themselves, there is commitment to be good stewards of the abundant resources (the Mission and Service Fund, the Reserve and the Morrison Bequest) for the work of the General Council, the denomination’s expression of a church that is fittingly national.

We live in a time of great change, yet we all long for certainty and stability. As we integrate these priorities, it is time to gently let go of work.. This means saying goodbye to colleagues, portfolios and partnerships that we have known and valued.

Transitions are difficult for everyone, but we are confident that in following the Gospel of Jesus Christ, the call is for the church to be relevant and vibrant in the 21<sup>st</sup> century. We believe the proposed plans are faithful to the Call to Purpose and Priorities discerned by the 39<sup>th</sup> General Council and its Executive for the next triennium and beyond.

“Two things are needed to guide our judgement and sustain our energy for the challenges ahead: a certain alarm at what is happening at present and a fascination with the future available to us if only we respond creatively to the urgencies of the present”. (Thomas Berry in *Evening Thoughts Reflecting on Earth as Sacred Community*.)

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### **Background on Priority Setting**

For nearly two decades, the Executives and staff of the General Council have been frustrated by visioning, priority setting, planning and budgeting processes. Lack of clarity of roles for the Executive and for the staff have made these processes and outcomes difficult. The context for the church in the community, society and the world is changing constantly and quickly. The redesign of the governance and staff models of the General Council in 2001 provided initial direction for articulating a strategic plan.

In 2001, the Planning and Priorities Group of the Executive laid the foundation for the work of a strategic plan. “In its history, the members of the United Church of Canada have felt the strength and excitement of being a human expression of God’s presence in the world. They have also experienced what it is to be a bruised and broken community. When the denomination is at its best – more than the sum of its parts – it has always been so by God’s grace and maybe by accident. Mostly, however, its most effective mission work has been the results of God’s grace, prayerful discernment, steady action and good planning.”

In 2004, the Executive of the 38<sup>th</sup> General Council clarified the process by which a strategic plan would be realized. The 39<sup>th</sup> General Council 2006 does the work of discernment, visioning and direction setting. The Executive follows up by clarifying the vision of the General Council and setting goals. Then the General Secretary, General Council develops a proposed strategic plan based on the General Council’s discernment, visioning and direction and the Executive of the General Council’s goals. The Executive receives, reviews the draft strategic plan and adopts a strategic plan and its associated budget. It is expected that subsequent General Councils will receive a progress report from the Executive at which point the General Council can adjust or alter the vision and directions.

### ***From the General Council – Call to Purpose***

In Thunder Bay, the 39<sup>th</sup> General Council 2006 engaged in the Kerygma café discernment process and affirmed “Call to Purpose: A message from the church to the church” as a timely purpose statement that would enable direction setting. In that statement (Appendix A), the Council identified that;

- We long for a deeper relationship with God.
- We long for deeper connections with one another.
- We acknowledge the brokenness, pain and fear we carry.
- We believe that our spirituality and our prophetic voice spring from one source and are lived in one Body.

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### ***From the Executive of the General Council - Priorities***

In November, the Executive of the General Council constituted a Priorities Task Group and directed them to lead a process to set priorities for this triennium at the May meeting. The work was based on the “Call to Purpose”.

The Executive affirmed the Call to Purpose as a statement of the church to the church for the purposes of determining the allocation of General Council resources and that planning for the period 2008-2010 give priority (in no particular order) to that which

- deepens our experience of intentional and authentic communities; stretches us beyond the familiar expressions and concerns of our church; with particular concern for our commitment to youth and young adult ministry, becoming an intercultural church; and living with respect in creation.
- supports and develops congregational ministries;
- supports and empowers ministry personnel;
- addresses the church’s brokenness in the relationships with aboriginal peoples and moving towards healing and building right relations

In addition, that the three year planning frame retain flexibility to accommodate emergent work appropriately directed, sustain those activities that are required to meet legal and *The Manual* obligations, and core operations, and be informed by the summaries and data gathered by the Priority Setting exercises. The Executive of the General Council directed the General Secretary, General Council to develop plans and budgets for the years 2008-2010 for presentation in June 2007.

From Call to Purpose, to the priorities set by the Executive in May, and by God’s grace these plans are offered.

### ***From the General Secretary – Plans Towards 2010***

In a constantly changing world, we must have the capability to make sense out of what is emerging. We are called to adapt. Our challenge is to create strategies that enable us to work the gap between what now is and what is needed. The staff of the General Council produced over ninety work plans detailing the scope and depth of the work of the General Council – what now is and what is needed – as named by the 39<sup>th</sup> General Council 2006. It is amazing the quantity and quality of ministry and mission that the staff and elected members of the United Church have enabled.

At this time, the work to be done exceeds the resources to do it. This calls for adaptive leadership to meet the adaptive challenges of this time – to work the gap between what is and what is

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needed. Where is God calling us to adapt and act? What is maturing? What will be sustained? What is emerging? What is stretching us? What must we do differently or end to make room for what is emerging?

### **What is maturing and what will be sustained?**

- Educated, equipped, empowered, compensated Ministry Personnel
- Revenue Generation – Mission and Service Fund, United for Peace Fund
- Resources for congregational life and leadership
- Welcoming, innovative, vital congregations
- Justice, Global & Ecumenical partnerships
- Racial Justice
- Conference/Presbytery Relationships
- Good Governance

### **What is emerging and stretches us beyond the familiar?**

- Healing and Reconciliation with Aboriginal Peoples
- Becoming an Intercultural Church
- Innovative Youth & Young Adult Ministries
- Caring for Creation

### **What must we do differently or end to make room for the new?**

The details of this section need to be provided in the context of the discussions at the June 21 – 23 meeting.

These questions inform the balance of this planning process. The Financial Plan provides opportunities to move into the gap from what now is to where we want to be in 2010. Imagining how the priorities named will shape the plans so that we can agree on the outcomes is the challenge. May we enter this challenge in faith, knowing that God has given us all that we need for the journey ahead. Indeed, we are not alone.

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### Foundations

The work of leaders in our church today is to learn the story of The United Church of Canada in order to tell its story – to help others find their place in that story so that they can participate in writing the next chapter of the story. Learning, telling, and rewriting the story is a practice of leadership that gives voice to *why* the church fulfills its purpose. Clarity of purpose is built on the foundation of shared values. What values lie at the heart of the story of The United Church of Canada?

What values would you name as foundational to the stories of The United Church of Canada? In decades of service in congregational mission, social justice and ecumenical partnerships, Richard Chambers has learned the story, tells the story and invites us to consider the next chapter of the story. Some values which are foundational to who we say we are:

- That all may be one
- *Missio Dei*, mission is God's, not the church's
- God is creatively and redemptively at work in the religious life of humanity
- whole world ecumenism
- examining our faith in light of not only the scriptures and tradition but reason and experience
- Christ's gospel of inclusive love
- faithful history of social concern and activism
- embracing feminist liberation theologies
- right relationships with Aboriginal peoples both overseas and at home
- covenanting for justice in the economy of life
- renewing our congregational and denominational identity

As the United Church prepares for the 21<sup>st</sup> century, we've done a better job of enabling God's mission in deeds of social justice than words of evangelism. Our challenge is to build on the best part of this historical legacy and join in God's transforming love already at work in the world. How sobering, then, is perhaps the most daunting challenge to mission for the United Church today: congregational mission. It may be true to say that the United Church has a greater interest in the state of the world than in its own survival and prosperity. The full text is available in Appendix B.

So then you are no longer strangers and aliens, but you are citizens with the saints and also members of the household of God, built upon the foundation of the apostles and prophets with Christ Jesus as the cornerstone. Ephesians 2:19-20

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As the church moves into its third generation, we are called to discern together a future that is faithful to God's call. The importance of shaping and claiming the story of identity and purpose of the denomination is our challenge. We face the tension and gap between what is and what is needed. How now must we live?

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### Application of Priorities to Our Work

The Call to Purpose gave rise to two themes that the Executive directed to inform the priority based plans that we create. The planning gives rise to that which deepens our experience of intentional and authentic communities and that which stretches us beyond the familiar expressions and concerns of the church. We believe that these themes inform all the priorities and in fact all of the work of the church.

- Congregational Ministry
- Ministry Personnel
- Healing and Right Relations with First Nations Peoples
- Intercultural Ministry
- Care of Creation
- Youth & Young Adult Ministry

From the narrative on each on the priority areas named, we expect the Executive to receive a compilation of outcomes by priority that will guide the work of the General Council for the next triennium. It is to this set of outcomes that the staff and resources will be distributed. The Executive can expect accountability to these outcomes.

### *Congregational Ministry*

The United Church of Canada is present in the nation's communities through the lives of 600,000 plus members and adherents, who gather in 3470 congregations (including Bermuda), contribute to 300 community ministries (camps, social justice ministries, chaplaincies, seniors facilities, campus ministries, etc.), benefit from 15 educational institutions and relate to over 140 global partners. In this time and place, God is calling us – personally and organizationally- to be the church. That is, God invites us into gathered communities of faith to participate in God's mission creating, healing, and renewing the world.

Many congregations are healthy and purpose-driven. Many congregations are struggling. Some are dying. There are places where new congregations need to be formed. Opportunities for new ministries abound. Each congregation has gifts and blessings to celebrate. Congregations are diverse – socially, theologically, culturally, etc. No single approach – simple or complex – will address congregations' desire for renewal. Renewal will take place as congregations open themselves deeply to God's purpose and, as caring communities, worship, learn, and share in Christ's ministry in God's beloved world. The research and learnings of the Emerging Spirit project provide additional building blocks for focussing these energies for renewal and development.

Congregational mission and renewal is supported in numerous locations within the General Council Office.

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- The Congregational, Educational and Community Ministries Unit seeks to strengthen and hearten the worship, witness and educational life of the body with particular focus on congregations, educational institutions and community based social ministries.
- The Justice Global and Ecumenical Relations Unit engages congregational mission through its expressions of people in mission, whole world ecumenism, and justice seeking work, and, in partnership with the Congregational, Educational and Community Ministries Unit and other units, seeks to live out a foundational belief that faithful and healthy congregations are focused outward to mission and relationship in God's world.
- French Ministries and Ethnic Ministries Units each share in specific aspects of support for expressions of congregational life similar to those reflected in the two units above, and more specifically as representations of the diversity of Canadian society. Together they share with the Aboriginal Ministries programs a leadership role in the intercultural vision of the church that must take root in all of the General Council's programs and in congregations if the church is to remain faithful to its distinctive identity as a Canadian church.
- Emerging Spirit is half way through its mandate as a major time limited initiative to, among other goals, renew of a sense of positive identity and enthusiasm for mission among United Church congregations for ministry in the new Canadian context.
- Resource Production and Distribution and Financial Stewardship support the production of numerous resources to assist the spiritual, worship, justice and thinking lives of congregations and their members.

The Congregational, Educational and Community Ministries Unit, as the lead unit with identified responsibility for congregational support, in partnership with other General Council Units will focus primarily on the renewal of congregations. Of particular concern are the key challenges identified from the Emerging Spirit project of deep-rooted congregational cultures highly resistant to change and leaders who do not feel equipped or supported in their efforts to lead change. The Unit recognizes that addressing these challenges cannot be done "from above," and therefore requires new and innovative initiatives in collaboration with other courts of the church and between General Council Units.

The Congregational, Educational and Community Ministries Unit will identify strategic goals to be realized and organize staff teams to effect these strategies. Congregational renewal – spiritual, missional, and organizational, including the re-energizing of youth and young adult ministry, will be the primary focus of endeavour. Congregational, Educational and Community Ministries Unit will give particular attention to the interrelationship of youth and young adult ministries to congregational renewal. Discerning the role of the various church-related educational institutions in this renewal process will be a strategic consideration.

Integral to this focus will be the cultivation of networks of leaders and the strengthening of the church's commitment to being a learning community. Renewal will also in part depend on

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congregations recognizing the important contribution and resource of the community ministries and educational institutions.

As Emerging Spirit moves into completion of its mandate, key aspects of its programming will be sustained and integrated into the work of the Units. Critical discernment will have to be made for the continuation of wondercafe.ca. The Congregational, Educational and Community Ministries Unit will need to give special attention to continued workshops in areas identified by Emerging Spirit and to the methodologies that have proven successful.

The Justice, Global and Ecumenical Relations Unit will continue to carry its mandate of representing the church in global partnerships and will redirect energy and resources towards people in mission programs, providing increased opportunities for interaction and engagement between congregations and global partnerships. Canadian social justice work will seek to engage congregations as the central form of the justice work of the church. A focus on environment and ecology will be maintained.

New discernment tools and approval mechanisms will be established to make strategic choices of which resources to produce. The aim is to reduce the number of resources based on a focus of responding to congregational needs.

### ***Ministry Personnel***

Education, support and development of ministry personnel ensures there are leaders throughout the church who inspire congregations and foster a denominational identity, uniting the church beyond regional and congregational interests. Ministry personnel are expected to incarnate the ethos of the United Church gained through theological education and ministry formation. They represent the presence of the wider church, and as officers of the denomination by virtue of their ordination, commissioning or appointment, they are leaders and participants in decision-making in congregations, Presbyteries, Conferences and the General Council. Ministry Personnel are among the key leaders who inspire people and congregations to stretch beyond the familiar in seeking God's realm on earth.

Ministry Personnel, both ordered and lay, will play a key role in sustaining our "deepest and truest identity." The investment in professional church leadership is not an innovation – it is our tradition.

There are about 2,200 ministry personnel serving 2,286 pastoral charges. Other ministry personnel serve community ministries and chaplaincies. About 2,000 retired ministry personnel continue to practice their leadership in their communities. Total compensation for ministry personnel serving pastoral charges is about \$105 million or 28% of the money raised for all purposes by all pastoral charges.

There are a series of related ministry personnel projects that the General Council is required to complete in 2007 and early 2008. Those projects include the implementation of:

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- Designated Lay Ministry policy and program
- Sexual abuse complaints policy
- Police records checks
- Racial justice training for Ministry Personnel
- Retirement policy changes
- Pastoral Charge payroll service

Ministry personnel continue to have interest and investment in the topics of isolation in ministry, ministry compensation, standards of practice and the exercise of discipline, and the meaning of ministry.

The following are some projects that could begin 2008.

- prepare strategies for defining the roles and relationships of paid accountable leaders, clarifying lines of accountability and authority; these strategies to be coordinated with initiating two projects: exercise of discipline and the meaning of ministry.
- develop programs that assist ministry personnel, pastoral charges and presbyteries, in creating and sustaining faithful, healthy relationships: beginning well, ending well and “fresh start”.
- develop a national policy to provide programs and funding that promote collegial, supportive relationships among ministry personnel based on their call to a common vocation.
- develop new resources for Ministry and Personnel committees in congregations to be more effective in their role with ministry personnel.
- more timely sharing of program and policy changes with ministry personnel.
- developing a more equitable salary system that recognizes education, years of service and special circumstances.

## ***Healing and Right Relations with Aboriginal Peoples***

Much has happened over the history of The United Church of Canada’s relationship with Aboriginal peoples. We have an historical legacy in which Aboriginal peoples became disconnected and dependent with a wounded spirit, a legacy in which the church was closed to the value of Aboriginal spirituality, imposed its Western ways and culture, and was involved in the operation of Indian Residential schools. Yet Aboriginal peoples survived and are still present

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and faithful to Creator's call to be who they are with their own identity, not to be "missioned to" as objects.

There has never been a time when the church was in unbroken, right relationships with Aboriginal peoples. In its healing journey, the non-Aboriginal Church strives to move beyond the words of lament of the 1986 Apology to First Nations Peoples and to act on the words of the 1998 Apology to Former Students of United Church Indian Residential Schools, and to their Families and Communities. The Church said, "We seek God's forgiveness and healing grace as we take steps toward building respectful, compassionate, and loving relationships with First Nations peoples... We pray that you will hear the sincerity of our words today and that you will witness the living out of our apology in the future."

Right relations are mutual movements and at the 39<sup>th</sup> General Council 2006, Aboriginal peoples expressed a desire to walk with the church toward equal and joint partnership in the long-term healing of the church and the world in the spirit of Christ. Partnership is the long-term responsibility of non-Aboriginal peoples as well as Aboriginal peoples in the church. The Aboriginal Ministries Steering Committee is continuing to be engaged in discerning Creator's plan for Aboriginal peoples in the Church.

Where is the Church broken in the relationship with Aboriginal peoples? What will move the Church towards healing? What will move the Church toward building right relations? What will move the Church to include Creator God in its healing?

- Settlements are just the beginning of healing of survivors of residential schools and communities. Traditional Aboriginal processes and language and culture recovery programs will continue to address brokenness of communities and survivors impacted inter-generationally by residential schools. The non-Aboriginal church must also find ways to move forward on a healing and reconciling journey toward proactive responses that will give life to the words of the 1998 Apology to survivors of residential schools
- More Aboriginal peoples are saying, "what does the Apology of 1986 mean to us?" More are saying, "is it time to start talking about whether it is time to accept the Apology?" "Let's talk more about the healing journey of residential school survivors and not stay in the turmoil." These conversations need time and space in community in culturally appropriate ways with each other and with the Spirit without pressures of western cultural time limits or common Church processes and outcomes that the majority church is used to.
- Regular national spiritual healing gatherings will be important spaces for these conversations to take place and to affirm traditional values and traditional spiritual practices.
- There are far too few ministers trained for Aboriginal churches. Ministers in Aboriginal congregations are needed to teach healing not preach about it; to teach spirituality not religion.

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- Many Aboriginal congregations have been without ministry personnel for years, sometimes decades. Many cannot call a minister because there is not enough available mission support money for salary. Many churches have severely sub-standard and uninhabitable manses and church buildings. This lack of “bricks and mortar” attention has sent the message to Aboriginal communities that the wider church does not care about them or their spiritual needs.
- Understandings of time and concrete results are vastly different between Aboriginal communities and Western communities. Linear, western time and measurable outcomes based expectations are challenged as the Aboriginal Steering Committee waits on the Spirit to guide its work. Having heard the elders’ wisdom to take the time to listen to community, to know and be who they are, the steering committee finds itself resisting the needs and expectations of the majority church to organize its work into a unit like all the other program units and to serve the Church’s needs at the expense of Aboriginal peoples’.
- Rather than ask what the national church needs from Aboriginal peoples, the questions that more appropriately address the church’s brokenness are: What support does Aboriginal peoples need from the national, wider church levels, and General Council Office? What leadership and spiritual gifts are Aboriginal peoples offering to the church?
- Healing the spirit of Aboriginal peoples will heal deeply wounded self-esteem; a healed spirit heals relationships between elders and youth; and from a healed spirit in community comes the strength for justice.

### ***Intercultural Ministry***

Engaging the French reality of Canada remains a major challenge for our predominately Anglophone church, yet doing so is necessary for the integrity and faithfulness of the church. French Ministries will maintain its focus as an expression of support to its mandate. The development of a francophone expression of Emerging Spirit will provide additional challenges and resources to this mandate. Ultimately what will be required are significant new resources to support the development of new francophone congregations and ministries.

Ethnic Ministries will similarly maintain its focus and the hiring of an Executive Minister for Ethnic and Intercultural Ministries will solidify the lead role of the Unit in providing support to the church in achieving its intercultural vision. As the work plans for this project sharpen resources will be identified.

### ***Care of Creation***

As the Justice, Global and Ecumenical Relations Unit will seek to engage congregations as the central form of the justice work of the church, a focus will be maintained on environment and ecology and the interrelationship of ecology, wealth and poverty.

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### ***Youth & Young Adult Ministry***

Youth and Young Adult Ministries within the Congregational, Educational and Community Ministries Unit will be strengthened with the creation of a staff team and the integration of this work into the larger congregational revitalization area. Inter-unit work will also be emphasized recognizing that significant new initiatives in this area will likely involve global relationships, and intercultural and ecological connections.

It is anticipated that a major initiative in youth and young adult ministries will be proposed and will likely require significant resources.

### ***Obligations – Legal, Manual and Operations***

Legal obligations comprise such things as:

- Ensuring trusts, endowments and general funds of the church are accounted for, audited and reported according to accepted standards and legal reporting requirements.
- Ensuring employees are paid and remittances to governments are made according to statutory requirements.

Manual obligations comprise such things as:

- A Moderator, a General Secretary, General Council Ministers
- Meetings of the General Council
- An Executive of the General Council
- Permanent Committees
- Archives, Audit, Judicial, Manual, Theology and Faith, and Transfer Committees

Operations comprise such things as:

- Office operations – rent, telephones, archives, records management, mail, reception services for about 62,000 square feet of space supporting meeting facilities and workspaces for about 200 people
- General accounting services, payroll processing, donation receipting, investment management
- Budget and financial reporting services
- Human resource services

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- Information technology services
- Legal counsel and services
- Media relations services
- Risk management and insurance

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### Financial Plan, 2008 – 2010

#### *Context*

Funding the work of the church is primarily through regular offerings in the congregations supplemented by direct giving programs. The total amount raised in all the congregations is about \$374 million per year and has been increasing at about 2% per year. About \$342 million of that is used for work of the church locally and regionally, and about \$32 million for the work of the General Council. Of the \$32 million, about \$30 million is raised through regular offerings to the Mission and Service Fund and about \$2 million through bequests to the Mission and Service Fund.

Although the total money raised in congregations for all purposes has been increasing by about 2% per year, the amount raised for the work of the denomination through the Mission and Service Fund has remained virtually constant at \$30 million for over 20 years. With about \$18M of the work (salaries and some grants) subject to cost of living adjustments the real capacity to do the work of the General Council has been reducing by about half a million dollars each year.

While the United Church of Canada Reserve has been used during the last five years to partially offset these inflationary pressures, the Finance Committee recommends reducing the use of this strategy since it is not sustainable in the long term.

The General Council financial operation can be described as:

$$\text{Revenues} + \text{Reserves} = \text{Grants} + \text{Staff} + \text{Program} + \text{Meetings\&Travel} + \text{Operations}$$

Revenues consist of:

- givings through the Mission and Service Fund (about \$30 million per year)
- bequests to the Mission and Service Fund (about \$2 million per year)
- proceeds from trusts and endowments – gifts to the church over many years (about \$1.3 million per year)
- sales of books and resources through the United Church Resource Distribution system (about \$1.5 million per year)
- other revenues (about \$1.0 million per year ) on items such as commissions on the Pre Authorized Remittance (PAR) program, fees for services provided to related organizations.

Reserves are transfers from the United Church of Canada Reserve (about \$2.3 million transferred in 2007) and interest earned on the Morrison Bequest (about \$0.5 million in 2007)

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Grants consist of:

- grants to global partners and the work of overseas personnel (about \$6 million per year)
- grants to congregations and community ministries in Canada through the Mission Support Grant process administered by the Conferences (about \$5.8 million per year)
- grants to theological colleges and education centres (about \$2.2 million per year)
- grants to Conferences to support their staffing and operating costs (about \$4.4 million per year)

Staff are the costs of salaries and benefits for those staff of the General Council Office funded through the operating budget. In 2007 there are staff equivalent to 185 full time positions (about \$11.8 million). There are also 13 full time equivalent staff funded from the Pension and Group Insurance Plans, 3 full time equivalent staff funded through the Residential Schools Fund, and 5 full time equivalent staff engaged in the Emerging Spirit project funded from the Morrison Bequest.

Program costs are non staff costs associated with operating various programs or services. Such costs include production of resources, holding conferences, events and consultations, purchasing of supplies.

Meetings and Travel are the costs of transporting and accommodating people for meetings of the approximately 120 task groups and committees, including the General Council meetings, as well as travel for staff.

Operating costs consist of office rent (about \$1.8 million per year), audit fees, banking charges, insurance, archives, telephones, computers, office operations.

For 2007, this is: (\$ millions)

Revenues	+	Reserves		Grants	+	Staff	+	Program	+	Meetings & Travel	+	Operations		
37.4	+	2.8	=	40.2	=	18.4	+	11.8	+	5.2	+	1.6	+	3.2

### *Principles*

The principles underlying the 2008 – 2010 Financial Plan are those of sustainability, stability and the capacity for emergent or unexpected work.

- Sustainability means balancing expenditures with revenues as well as using reserves in a way which applies them to work of the church and at the same time maintains them in a healthy position.

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- Stability over the plan period means making major adjustments early in the plan to position resources for the plan's duration rather than making a series of minor adjustments each year.
- Capacity for emergent or unexpected work means intentionally setting aside financial resources to respond to opportunities without necessarily having to reconfigure planned work in progress.

The principle of adjusting both expenses (staff, program, ...) and grants has also been used.

### ***Assumptions, 2008 - 2010***

1. M&S givings would remain steady at \$30.2 million per year.
2. M&S bequests would change from \$3.4 million in 2007 to \$2.6 million in 2008, and then \$2.0 million and \$1.8 million for 2009 and 2010, respectively. This is due to an unusually large bequest received in 2005 which resulted in a larger than usual amount available in 2007. M&S bequests over a five year average about \$2 million per year.
3. Proceeds available from trusts and endowments would remain steady in the \$1.3 million range each year.
4. The Task group on funding the work of the church will be making recommendations in November 2007 on long term strategies to fund the work of the church. The Finance Committee, in concert, is exploring the potential of a major fundraising campaign across the whole church which might see fundraising efforts to support congregations, community and other ministries, various church related institutions and the General Council. While these initiatives offer promise for revitalized funding, the fruits of these efforts would not likely be seen in the 2008 – 2010 time frame.
5. The United Church of Canada Foundation continues to develop and it is not seen as a major source of funding in this planning timeframe.
6. Revenues from sales of resources and other revenues would remain steady in the \$1.5 and \$1.0 million range respectively.
7. The Task Group on General Council Grants to Conferences will be making recommendations on articulating the purpose and principles for the grants, and the amount of the grants. Its work will assist in bringing clarity to the relationship between the General Council and the Conferences with respect to what kinds of work are best undertaken between these two courts and what level of financial and human resources are appropriate to support the work.
8. The United Church of Canada Reserve can sustain a draw of about \$2 million per year and maintain a balance of about \$7 million.

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9. Work related to Residential Schools will continue to be funded from the Residential Schools Fund. Anticipated payments to the United Church from insurers and payments from the Government of Canada would be directed to the Residential Schools Fund and further funding may be required.
10. The work of Emerging Spirit, funded from the Morrison Bequest, will continue to 2009 after which the balance of the Morrison Bequest will be about \$9.5 million.

### ***Plan***

In terms of managing of the United Church of Canada Reserve, by 2010 the plan calls for a \$1 million draw to revenues and the setting aside of \$1 million as capacity for emergent or unforeseen work. (This capacity is about 3% of the total annual plan.) This adheres to the principles of making the Reserve work for the mission of the church, keeping it healthy, providing capacity for emergent or unseen work, and it responds to the direction to reduce the reliance on the Reserve in the revenue stream. And, with the Reserve balance projected to be stable at \$7 million, under the terms of the Executive's Fund Policy, the full amount of the Morrison Bequest would be unrestricted and available to resource a major initiative.

This approach to the reserve and the assumptions on revenues, places total resources available in 2010 at \$36.9 million. The corresponding amount for 2007 is \$40.2 million.

In order to move from the current state to 2010 level, two general actions are planned:

1. Beginning in the latter half of 2007 and into the first part of 2008, staffing levels will be adjusted downward and held at the new level through to 2010. Expenditures on meetings and travel will be reduced and held at the lower level through to 2010. Some smaller adjustments in program expenditures will be made and held at the new level through to 2010.
2. Beginning in 2007 consultation with global and local partners will be undertaken so that for the year 2009 grants to global partners and Mission Support Grants can be reduced and maintained at the lower levels. Reductions would be in equal proportion between local and global partners. Grants to Conferences are planned remain at current levels pending the Task Group on Conference Grants which is scheduled to report in November 2007. Grants to theological colleges and education centres are also planned at current levels pending further analysis.

The global partnership grant area consists of overseas personnel, Canadian and global ecumenical and justice grants (i.e. KAIROS, World Council of Churches and the Canadian Council of Churches) and global partner grants.

In the support of congregational ministries and community and justice ministries, mission support grants parallel the support of global partnership grants towards support of partner

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churches and social and justice ministries among the most vulnerable of our world. While the Mission Support Fund most closely represents “care for ourselves” it also funds significant ministries for the most vulnerable in our society. In respect to the global context, global grants represent “care for others.”

There is currently an approximate parity between mission support grants and global partnership grants. Global partnership grants have declined significantly through the past recent number of years while Mission Support Grants have increased. Both areas have declined substantially from several decades ago. An approximate parity between the two grant areas seems an equitable and just approach to balancing an overall reduction in grants.

The use of financial resources over the plan period is:

	2007	2008	2009	2010
Resources Available (M)	\$40.2	\$39.1	\$37.2	\$36.9
<hr/>				
Proportion (%)				
Grants	45.8	47.3	44.9	45.3
Staff	29.4	29.7	30.4	31.4
Program	12.8	12.0	12.9	11.4
Meetings & Travel	4.0	3.3	3.5	3.5
Rent	4.5	4.6	5.1	5.1
Operating	3.5	3.1	3.2	3.3
Total	100.0	100.0	100.0	100.0

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### *Financial Projections*

The United Church of Canada 2008 to 2010 Financial Projections	2007	2008	2009	2010
	\$M	\$M	\$M	\$M
<b>REVENUES</b>				
Mission and Service Givings	30.0	30.2	30.2	30.2
Mission and Service Bequests	3.4	2.6	2.0	1.8
Trust, Endowment and Designated Funds	1.3	1.4	1.4	1.3
Sales of Resources	1.8	1.5	1.5	1.5
Other	0.9	1.0	1.1	1.1
A From Reserves: UCC Reserve	2.3	1.9	1.0	1.0
From Reserves: Morrison Bequest	0.5	0.5	0.0	0.0
B Total Revenues	40.2	39.1	37.2	36.9
<b>GRANTS</b>				
C Global Partners	6.0	6.0	5.1	5.1
C Mission Support	5.8	5.9	5.0	5.0
D Theological Colleges and Education Centres	2.2	2.2	2.2	2.2
D Conference Operations	4.4	4.4	4.4	4.4
Total Grants	18.4	18.5	16.7	16.7
<b>EXPENSES</b>				
E Staff	11.8	11.6	11.3	11.6
Program	5.2	4.7	4.8	4.2
F Meetings and Travel	1.6	1.3	1.3	1.3
Rent	1.8	1.8	1.9	1.9
Operating	1.4	1.2	1.2	1.2
Total Expenses	21.8	20.6	20.5	20.2
<b>REVENUES LESS GRANTS AND EXPENSES</b>				
	0.0	0.0	0.0	0.0
Emerging Spirit (from Morrison Bequest)	3.2	2.8	2.5	
G { Residential Schools (from Residential Schools Fund)	1.5	1.5	1.5	1.5
{ Healing & Reconciliation (from Morrison Bequest)		tbd	tbd	tbd
A Capacity for Emergent & Time Certain Work (from UCC Reserve)			1.0	1.0
<b>RESERVE BALANCES AT YEAR END</b>				
UCC Reserve	7.8	7.6	7.4	7.1
Morrison Bequest	14.2	11.3	9.5	10.1

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### **Next Steps**

In the process of applying the priorities to the work of the Church in order to develop the priority based planning document, we have identified some secondary principles which help determine the manner in which the work is done. The three year planning process will allow staff, the Executive and all those interested in the United Church to have a better sense of what to expect, so that each year's budget exercise is not a source of apprehension or uncertainty.

### **Staff Plan**

No work has been identified that is undesirable, so it was necessary to assess which positions and work could best be changed or stopped in order to uphold the priority areas. Positions which may be eliminated are being identified in relation to the priorities, not across the board in all areas, and not by random approaches such as attrition or seniority. We are also sensitive to maintaining diversity in the workplace.

Staff whose positions are eliminated will be treated with respect, reassured that their contributions have been appreciated and offered severance in accordance with our human resource policies. In some cases, there will be opportunities to move into positions which are vacant or new positions created for priority work, but this will not be possible in most cases.

We have proposed a staff plan based on the proposed Financial Plan which will be distributed at the meeting. With the possibilities of changes to staffing, we seek the confirmation of this plan and its implications with the Executive before making this information public.

### **2008 Budget and Work Plans**

As has been the budgeting process of the Executive for the past few years, upon approval this June by the Executive of the three year Financial Plan and the proposed priority based plan for 2008, the fall meeting of the Executive will receive the detailed work plans and budget for 2008.

### **Future Considerations**

This year's priorities and planning document is part of a three year process that will take us through to 2010. The recommendations reflect the best planning that could be done between the time the priorities were set in early May, and the meeting where the recommendations are to be approved at the end of June.

There are a number of broad issues that require study, consideration, and policy development before the end of this three year period, in order to guide future decisions. These are identified below, and the Executive of the General Council and the General Council Office staff will both have roles in completing this work.

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### **Business Practices Analysis and Review of General Council Office**

The General Secretary will direct that an “efficiency study” of our administrative practices for the work of the church be done, covering such things as travel approvals and expense claim processes, meal arrangements and other supports for meetings, purchasing of supplies, and similar items related to the administrative and operational management of our functions.

### **Simplification of Policies and practices**

There is a need to seek ways to simplify the complex policies and procedures that govern Human Resources matters as well as other administrative functions, so that we continue to uphold the important principles at stake, without burying people (staff and volunteers alike) in overly complex requirements. In relation to the personnel policies that relate to staff, work is already underway under the direction of the Ministry and Employment Policies and Services Committee. The Manual Committee may also be called upon to assist with this work.

### **Balance of management and non-management staff in the General Council Office, and clarification of roles**

Although a complete restructuring of the staff complement is not desirable, given that major changes in this regard were made just five years ago and are still being evaluated, it is important to consider whether we have the appropriate balance of management and non-management staff positions in the organization, and that the structure incorporates a strong accountability model. This is particularly relevant in circumstances which anticipate reductions in the overall staff complement. The General Secretary will consult with the Ministry and Employment Policies and Services Committee on this.

### **Roles of each of the Courts of the Church and how best to complement and support one another**

The United Church of Canada has a complex model for governance, with four courts consisting of congregations, presbyteries, conferences, and the General Council. There is a need for greater clarity in the roles of each court, what is best done in each, and what support is needed from the others to allow each to perform its role. Leadership in this task needs to come from the elected leadership of the Church, supported by staff.

### **Governance processes of General Council, including clarification of roles and practice of Committees and support to Committees**

The United Church of Canada is both blessed and burdened with wide interests in many areas related to our faith and to living out our faith. This means that both Executive and General Council meetings deal with so much material that it can be hard to focus on the matters most in need of thought and decision. In addition, there is sometimes a lack of clarity as to who makes what decisions. In addition, there are a large number of committees with diverse purposes, and

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sometimes a lack of clarity about their roles (advisory? decision making? studying?) and their accountabilities. All of this would benefit from thorough review direction led by the Governance Planning and Budgeting Processes Committee and with support from staff.

### **Theological Education, recruitment of new ministers, meaning of ministry**

There are several studies or initiatives under way relating to the general area of how we define our accountable ministry leadership, what qualifies someone to serve in this way, and how we support this leadership. There is a need to coordinate these efforts, and to consider also what we need to be doing to recruit and develop leadership for the future, what barriers currently exist, etc. This will require coordinated work at the staff level, and decisions by the elected members.

### **Overseas personnel/partnerships**

The global mission work of the church is expressed in the presence of overseas personnel accompanying partners in various locations throughout the world, through partnerships with regional, global and local agencies, churches and organizations and in education for justice work in Canada. The work of partners ranges from advocacy for justice to development projects. Budget circumstances suggest that a reduction in the overall amount will be needed by 2009. Before determining where those reductions would be applied, review and consultation is needed with those involved and those affected. This review should take into account the potential for increasing direct congregational relationships with overseas partners, and the potential for increased use of volunteers in accompaniment of global partners. There is a role for both staff and elected in this review, which should guide the decisions as to budget allocations for 2009.

### **Capacity for major fund raising to take us to new levels**

Difficult decisions about budgetary allocations are necessary because of the “flatline” projections for the Church’s resources. There is the potential for increasing revenues in the future, based on telling more effectively about the United Church’s vision and faithful action and inviting caring people to share in that directly. It would not be wise to ignore the current revenue trends in setting the budget for this year and the current triennium, but it is noted very positively that the Finance Committee has been mandated to return to the General Council Executive in November 2007 with recommendations for a major fund raising campaign.

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### Appendices

#### *A) Call to Purpose—A message from the church to the church*

What purpose lies at the heart of The United Church of Canada in the beginning of its third generation? Spirit has moved in our time, and with a new restlessness we have heard a call to step forward. We have been together in deep conversations, surprised and gratified at the depth of connections. We have recommitted ourselves to seek right relationships and to withstand that which denies life. Our discernment has persuaded us that as followers of Jesus and in the movement of the Spirit, we must attend to these things:

#### **We long for a deeper relationship with God.**

We remember that we are created in love, by God, for God. We are called to devote time and energy listening for God's voice, reflecting on our life in Christ. We want to learn and lean in to spiritual practices of discernment, silence, and theological reflection.

#### **We long for deeper connections with one another.**

We remember that we encounter Christ in each other. Listening deeply, we are in search of genuine conversations and understanding—within the church and with international, ecumenical, and interfaith partners. In our conversations and decision making we will be mindful of our commitment to interculturalism. We want to honour children and youth as a vital part of the church's present, as well as the promise of the future. All these connections strengthen us to live in our faith and to work for justice and peace as the Body of Christ.

#### **We acknowledge the brokenness, pain, and fear we carry.**

There is pain in our congregations and communities. There is pain in our wounded relationships with all those who have been marginalized and isolated, in our past and present. We recognize in our lives the pain and the power of what is not of God, and we want to claim the courage to resist its domination. We are sustained with awareness of the healing presence of God in Christ.

#### **We believe that our spirituality and our prophetic voice spring from one source and are lived in one Body.**

We are restless with a renewed call. We are seeking to live faithfully as a united people in a divided world. We seek to be authentic. We seek relationships that are truthful and just. We long to embody what we say we believe, to be The United Church of Canada, for our communities, for the world, and for Creation.

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In this spirit we pray:

God of all creation,  
we offer you our thanksgiving for a time rich with connections,  
among each other and with you.  
We thank you for moments when we have experienced what it is to be united  
even in our differences.  
Help us to grow as a listening, discerning, learning people.  
Help us to give up patterns and structures that enslave us and others.  
Help us to acknowledge our fear  
and lean into your hope and your courage.  
Help us to grow in our trust in each other and in your Spirit.  
Fill us with your grace and with your wisdom,  
with your patience and with your love.  
Propel us into your future,  
rooted in the richness of our past.  
In Christ we pray.  
Amen.

### ***B) Missio Dei and The United Church of Canada in the 21<sup>st</sup> Century***

By Richard Chambers, The United Church of Canada

The call for a united Christian mission began in the late 19<sup>th</sup> century in Canada in response to the scandal of divided denominational missions serving both the vast Canadian northwest and overseas. The United Church of Canada was formed in 1925 as a union of the Methodist, Congregationalist, and the majority of Presbyterian congregations across the country. Joining as well were dozens of union churches that had already responded to the biblical imperative “That all may be one” (John 17:21), the motto of the new denomination.

#### **Listening for God’s Mission in the 20<sup>th</sup> Century**

The United Church is a child of the 20<sup>th</sup> century ecumenical movement, a defining characteristic of which was the recognition that God’s mission is broader than the church. The term was first used by the World Council of Churches as early as the 1930’s to stress that mission is God’s, not the church’s.

Another development of the ecumenical movement was dropping the “s” from “missions” to reflect the holistic task of the church. This notion has continued to evolve and is reflected in the United Church’s understanding of *partnership*, in which mutuality in God’s mission is seen as the starting place with our global partners. Indeed, the United Church affirms that “God is creatively and redemptively at work in the religious life of humanity” (Commission on World Mission Statement in 1966), and must consider its mission in light of “whole world ecumenism” (General Council of The United Church of Canada, 1997).

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Nothing should be done separately that cannot be done with others. A commitment to ecumenism is foundational to our understanding of God's mission both within Canada and globally. The challenge in the 21<sup>st</sup> century will be to become even more open to finding God's mission with other faiths.

Broadly speaking, the United Church can be characterized theologically as the voice of the liberal Protestant church in Canada. Its roots in the 1920s reflect a strong interest in the emerging field of literary biblical criticism, and today we are still defined by an ongoing commitment to examining our faith in light of not only the scriptures and tradition, but reason and experience. Such an approach to theological reflection has helped us to celebrate that wives are not subject to their husbands and that people of other faiths are not doomed.

While the United Church holds to the principle of *sola scriptura*, we also “hold to the hermeneutical principle that biblical passages which damage the humanity of people, such as women, Jews, homosexuals or other outsiders must be subordinated to the central biblical message of the equality of humans before God and of God's universal love for them” (Gregory Baum, 2005). These beliefs have been evident from the initial formation of the United Church, beginning with the ordination of the first woman, Lydia Gruchy, in 1936. The challenge as liberal Christians is to hold liberal positions not because of a diminished faith, thereby becoming indistinguishable from secular social activists or psychologists (John Cobb, 1973), but in Christ's gospel of inclusive love.

Twinned with liberal Protestantism is a social-democratic sensibility which has allowed the United Church to pursue justice, peace, and the integrity of creation—to use the World Council of Churches formula—to such an extent that it has been suggested that the greatest strength of our denomination is its long and faithful history of social concern and activism (Douglas Hall, 2004).

Building on the activism of the feminist movement in the 1960s, and gaining steady momentum through the 1970s and '80s, the United Church embraced feminist liberation theologies. This began with a general critique of the immense human suffering resulting from capitalism and the impoverishing “development” plans for the “Third World,” and has grown to include a range of critical theologies regarding racism, sexism, environmental destruction, colonialism, and homophobia. Feminist liberation ethics, pedagogies, and theologies are now pervasive throughout the United Church (Schweitzer and Simon, 2004).

As regards sexual orientation, the sexual revolution of the 1960s and '70s had exposed the discrepancy between the thin veneer of Victorian propriety in Canadian society and actual human behaviour. This allowed the church to take truly radical steps and celebrate the inclusion of gays and lesbians to ordered ministry in 1988, and then the covenant of marriage in 2003.

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### **Right Relationships with Aboriginal Peoples**

Other challenges, such as the interwoven threads of racism and colonialism, remain starkly evident for the United Church in the 21<sup>st</sup> century—in particular, right relationships with Aboriginal peoples both overseas and at home. The United Church has a long history with the indigenous peoples of Canada in tandem with parallel missionary activity around the world from Angola to Zimbabwe. The result for First Nations in Canada has been the development of Aboriginal churches and leadership, and more recently, advocacy on the part of the church for Aboriginal land rights and self-government.

Movement on the part of the United Church towards right relationships has only come after recognizing that earlier “missions” had not treasured the First Nations understanding of creation, “a Mystery that surrounds us all that was deep and rich,” but the church had instead “confused western ways and culture with the depth and breadth and length and height of the gospel of Christ...imposed our civilization as a condition for accepting the gospel...and in so doing...helped to destroy the vision” (General Council of The United Church of Canada, 1986).

A tangible expression of assimilation was the operating of “Indian” residential schools by Canadian churches in league with the government, which again had counterparts in overseas missions. Consequently, top mission priorities for the United Church, to be pursued ecumenically with all Canadian churches, range from active listening to residential school survivors and calling for a public inquiry regarding the legacy of residential schools in Canada, to ongoing commitment to the United Church Healing Fund, to supporting First Nations leadership within the church, in society, and in solidarity with our partners overseas. High on the list of mission priorities is the building of right relationships of justice and respect with aboriginal peoples. Still barely explored is the challenge of addressing the legacy of racism and colonialism that has characterized relationships between European settlers and more recent immigrants to Canada.

### **Neo-liberal Economic Globalization**

In addressing the justice questions for Aboriginal peoples at home and abroad—as well as a host of other issues such as immigration and refugee concerns, peace and security, and environmental destruction—the challenge of neo-liberal economic globalization undercuts and often bars any lasting change for the good. Consumerism and materialism dominate the life and culture of our communities. Unfettered capitalism now shapes the very structures of our societies, pushing the planet into crisis—a crisis for millions of people and for creation itself.

Yet many members of the United Church are the beneficiaries of the current economic order, and thus the greatest mission challenge for the church will be to unmask the aura of inevitability associated with the present economic structures (General Council of The United Church of Canada, 2000).

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As in almost all aspects of mission, the United Church does not pursue economic justice alone, but ecumenically. Building on 30 years of ecumenical coalition work, churches from the Roman Catholic Church to evangelical conservatives have responded to a variety of issues and were able to mount an amazing campaign around the Jubilee in 2000. Having received 600,000 signatures from Canadians calling for release from bondage, especially the forgiveness of debt for the global South, redistribution of wealth, and renewal of the earth, the Prime Minister of Canada publicly acknowledged the impact of the churches' witness. Today, this important work is carried on by KAIROS: Canadian Ecumenical Justice Initiatives and resonates with the 2004 Accra statement of the World Alliance of Reformed Churches, *Covenanting for Justice in the Economy of Life*.

## Congregational Mission

How sobering, then, is perhaps the most daunting challenge to mission for the United Church today: congregational mission. It is true to say that the United Church has a greater interest in the state of the world than in its own survival and prosperity. Frankly, in the age of Christendom, the United Church never had to pay too much attention to articulating its faith, as churches were automatically filled with each succeeding generation as the basic Christian story was reflected throughout society, especially in public schools (Douglas Hall, 2004).

At the very time that the church has been disestablished and it is vital to renew our congregational and denominational identity, we discovered that the wider society doesn't know who we are. It's been two generations since most people in Canada went to church, and ideas of the Christian faith are as likely to have been learnt from late night television evangelists. There are no longer as many people who know the biblical story, let alone are willing to commit themselves to God's mission in the community.

Meanwhile, congregations speak a language of faith in worship that is increasingly foreign to the majority of Canadians (General Council of The United Church of Canada, 1994). The colonial legacy of confusing the gospel with Western culture has silenced our evangelism, but the spiritual yearning of postmodern society invites us to consider afresh our evangelical calling. The faith of recent immigrants can enliven the church, and those of other faiths can help challenge us to a more articulate expression of our own faith (Executive of General Council, The United Church of Canada, November 2001). The challenge is how to develop greater theological depth without doctrinal narrowness and without diminishing our social justice priorities (Douglas Hall, 2004). And so we celebrate the development of a new statement of faith and a number of new models of congregational mission that link soul care and social care, inviting members to reflect on the gospel with the input of our global partners and to act locally.

Ephesians 2:19 reminds us that the church is part of a larger household of God. Using the image of a house, we now know that our worship room needs to reflect the variety of languages and styles that represents our changing Canadian context. Our outreach room has a good track record, but the challenge of neo-liberal economics remains daunting at both the personal and political level. The room that represents ministry personnel needs some tender care. And the

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entire architecture of the house needs to reflect a mindful commitment to racial justice. As the United Church prepares for the 21<sup>st</sup> century, we've done a better job of enabling God's mission in deeds of social justice than words of evangelism. Our challenge is to build on the best part of this historical legacy and join in God's transforming love already at work in the world.

So then you are no longer strangers and aliens, but you are citizens with the saints and also members of the household of God, built upon the foundation of the apostles and prophets with Christ Jesus as the cornerstone. Ephesians 2:19-20