

**GA-1511**

**HIGHER EDUCATION AND LEADERSHIP MINISTRIES  
REPORT TO THE GENERAL BOARD  
OF THE CHRISTIAN CHURCH (DISCIPLES OF CHRIST)**

**Submitted by  
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**INTRODUCTION**

With the whole church, Higher Education and Leadership Ministries works to help proclaim and embody the reign of God and to be part of the human transformation that is the mission of the Church of Jesus Christ by developing and nurturing leaders who will renew and transform the church in the coming generations.

Following the retirement of Dennis Landon in June of 2014, after 17 years of faithful service, the HELM board of directors called Bernard “Chris” Dorsey to the presidency for a transitional period of three years. Six months into this transitional period, there is a sense of optimism for the future of HELM. There is also a greater sense of where the key opportunities for furthering HELM’s mission are and what the potential for growth is. One of the most significant changes in the past six months has been a commitment on the part of the HELM and the council of Colleges and Universities to resume working more closely together to advance the mission of HELM and the missions of the colleges and universities in service to the wider church and society as a whole.

While it is true that this is a time of transition for HELM, it is also a time of significant transition for the church as a whole. At the national level, the general board has tasked the General Minister and President with exploring a mission focused structure that could result in significant changes in the way the church functions. Many regions are going through changes in leadership and some have been challenged by financial and administrative difficulties. While some general ministries of the church have experienced greater stability in clearer focus in recent years, other general ministries have begun to discover new challenges and problems that might make some of their futures uncertain.

As a general ministry of the church, HELM is in a unique and very promising position. In recent years, HELM has been under some financial strain to carry out its mission for the benefit of the largest possible number of constituents and the relationship with key institutional constituents has been fraught. The strain on HELM staffing resources has also been a significant challenge for the organization. However, with the board having committed to this transitional period of strategic discernment, The prospects for continuing the important work of HELM and even increasing HELM’s positive impact on the church and the world are actually very good.

With a healthy dose of measured optimism, the report is submitted to the General Board of the Christian Church (Disciples of Christ).

## **HELM PRIORITIES AND KEY STRATEGIES FOR THE NEXT TWO TO FIVE YEARS**

### **Financial Equilibrium**

1. **Redesigned Budgeting and Financial Reporting** – In the past six months, HELM has redesigned its budgeting and financial reporting process. This provides the board of directors with a better picture of HELM's financials. It is also a format that brings HELM's financial reporting in better alignment with other general ministries and best practice financial reporting for non-profits.
2. **2014 Development Strategy** – In order to continue current programming and look at ways to improve funding for HELM programs, HELM must find ways to increase funding from non-DMF sources. In recent years, the annual fund has relied heavily on a single donor. The development strategy currently being pursued by HELM will strengthen the annual fund by increasing the number of key donors, reaching out to more potential major donors, and laying a foundation for major giving and planned giving to support the future growth of HELM's programs. In the first year, the annual fund will be the primary focus of increased giving. In the second and third year of this strategy, the focus will be increased giving to support three main components of HELM's mission: 1. Scholarships for undergraduate education, with an emphasis on Disciples students at Disciples related institutions; 2. Scholarships for graduate theological education, with an emphasis on Disciples related institutions; and 3. Funding support for leadership development programs such as the leadership fellows program and disciples leadership institute.
3. **Reorganization of HELM Staffing** – HELM's staffing has been under significant strain since the departure of Brad Lyons. Much of Brad's responsibilities were shifted to two of HELM's remaining staff and a contractor was hired to assume much of the responsibility for the Leadership Fellows program. With Dennis's retirement, this configuration has led to even greater strains on HELM's limited resources. VP & Treasurer Linda Plengemeier has announced her plans to retire on June 30<sup>th</sup> and this represents both a significant challenge to HELM as well as the possible opportunity to reconfigure all of HELM's staffing to better fulfill HELM's mission. The new staffing configuration will not only allow for existing programs to be coordinated more effectively, but it will allow the organization to allocate resources toward financial growth and better support of three key areas: 1. Program coordination of HELM's programs such as the leadership fellows program, the seminarians conference, and Disciples Leadership Institute, 2. Coordination of HELM's overall development and communications efforts; and 3. A return to fulfilling HELM's previous role of doing the interpretive & advocacy

work of supporting Disciples related colleges & universities, theological institutions, and campus ministries.

## **Program & Staff Assessment**

1. **Leadership Fellows Program** – The HELM Leadership Fellows program is undergoing some changes to help increase its effectiveness and address some recent challenges.
  - a. We are returning to the previous approach of having students apply in their last year of high school and they would then receive support and participate in the leadership fellows' retreat during their four years of undergraduate education.
  - b. We will also be working to have the Leadership Fellows retreat take place on the campuses of Disciples related educational institutions and in locations that are strongly connected to Disciples history and culture. This will both save money and expose students to the rich Disciples heritage and the ongoing mission of various expressions of the wider church
  - c. We are also restructuring the program around four specific themes that will provide focus for each of the four cohorts as they matriculate through the program.
    - i. **First Year: Community** – In the first year, students will focus their time in the program on learning about community. This will be the focus of the retreat in their first year and they will also spend time during the year learning about community in a specific context of their choice. Following the retreat, students will gather for two Google-hangouts during the rest of they year and will provide a summary report of their learning at the end of the year.
    - ii. **Second Year: Transformation** - In the second year, students will focus their time in the program on learning about transformation in community and society as a whole. This will be the focus of the retreat in their first year and they will also spend time during the year learning about transformation either in specific communities or an area of transformation in the wider society. Following the retreat, students will gather for two Google-hangouts during the rest of they year and will provide a summary report of their learning at the end of the year.
    - iii. **Third Year: Global Awareness** – In the third year, we are looking to partner with another ministry to provide student with an opportunity to travel outside the use as they learn about global citizenship and the role of the church in today's world. Students will not attend the retreat in their third year, but will instead have two Google Hangouts in the early part of the year and the internationals trip in late May or early June.
    - iv. **Fourth Year: Mentoring/Vocational Discernment** – In the fourth and final year, students will choose a mentor from their campus to work with on thinking about their own vocational discernment and their role

as an emerging leader. This will be the focus of the retreat in their fourth year and students will have two additional Google-hangouts through the rest of the year.

2. **Disciples Leadership Institute** – This program will be strengthened through seeking outside grant funding to support its growth and ongoing activities. Similar to the strategy of strengthening the Leadership Fellows program, there is the opportunity to have the Institutes take place on the campuses of Disciples related educational institutions and have access to key Disciples scholars. Another area of strategic focus will be increasing the visibility of DLI throughout the wider church and having participants who have gone through DLI offer workshops at General Assembly and various Regional Assemblies to help impart their learning's to a wider audience.
3. **Disciples Seminarians Conference** – The Seminarians Conference is undergoing a shift in its structure and focus. While past conferences have been structured to give general ministries the opportunity to present information to seminary students, the conference is being redesigned with the following primary commitments:
  - a. Students have a chance to develop and deepen connections with other Disciples Seminarians.
  - b. Seminarians will hear from the General Ministries individually and collaboratively.
  - c. Seminarians have the chance to speak to the leadership about their hopes and dreams for the church.
  - d. Seminarians will have the opportunity to engage in spiritual renewal.

While the general ministries have contributed to this redesign of the seminarians conference, the theological institutions have not been significantly engaged in the process of working to improve the conference. The next step in this strategic process will be to work with the Disciples theological institutions to improve this important program.

4. **HELM Staffing** – In recent years, due to transitions and declining revenue, HELM staff has been reduced and restructured in ways that have made the staffing “administration heavy” and has not provided the optimal configuration for HELM’s mission. HELM’s staffing is being strategically re-aligned with a greater emphasis on supporting HELM’s programs and the work of the three councils. The following is the proposed staffing structure:
  - a. President
  - b. Office Coordinator
  - c. Part-time Director of Programs and Technology
  - d. Part-time Director of Development and Communications
  - e. Finance Consultant/Contractor

## Relationship With Higher Education Institutions

1. **Council of Colleges & Universities:** HELM is moving forward with increasing its support for the colleges and universities in ways that help maintain and strengthen the historic relationship between the Disciples related colleges and universities and the wider church. This relationship is crucial to the covenantal nature of the relationship and it is crucial to the ongoing mission of HELM. The wider constituency of both the church and HELM's prospective supporters understand the rich legacy of education that is central to Disciples history. Working more closely with the Council of Colleges and Universities will strengthen HELM's ability to carry out its mission. One of the key responsibilities of the part-time director of development and communications is supporting the work of the Council of Colleges and Universities.
2. **Council on Theological Institution:** Leadership development takes place in a wide variety of places throughout the church. HELM can play a crucial role in identifying opportunities for coordinating leadership development across various ministries of the church. One way this can be done is to work more closely with the theological institutions on a coordinated effort to create a cohesive leadership development strategy for the denomination. As of December, HELM has assumed responsibility for the leadership development initiative that was commissioned by TLC and will be working with the Council on Theological Education and others to develop this strategy. Also, one of the key responsibilities of the part-time program coordinator will be supporting the work of the Council on Theological Education.
3. **Council of Campus Higher Education Ministries:** This council needs to be evaluated, redesigned and reconvened. It is currently not staffed. HELM will be working with a group of campus chaplains and church relations directors to re-establish this council.

## Board Development & Participation

1. HELM is fortunate to have a strong and diversely constituted board. In order to ensure this continues, considerable attention must be given to continued board development and participation.
2. Board Training – The Office of the General Minister and President has been working with the Cabinet to identify opportunities for training board members. There is currently the availability of someone who is certified to offer training in the area of governance and we are working to have someone provide a training module on governance at our next board meeting
3. Board Recruitment – We have had some positive success in recent years with recruiting talented individuals to serve as directors. At the recent board meeting, the HELM board of directors elected four people to serve as directors: Lonora Grave, Billie Lynch, Pamela Sparks, and Santiago Pinion.
4. Board Participation – Financial participation in advancing HELM's mission has increased among board directors, but is not yet at 100%. We will work closely

with the development committee to accomplish this and to present directors with additional opportunities to help HELM attract financial support in the coming years.

## **Summary**

These four priorities remain key areas of focus for this transitional period. They will form the basis for a more substantive strategic presentation and board conversation during the April meeting of the board.

## **HELM PROGRAM UPDATE**

### **Leadership Fellows**

The Leadership Fellows program remains the signature program for HELM and continues to attract talented students. The recent leadership fellows' retreat went well and we had 22 students attend. The plans to redesign the program have been mentioned previously in this report. In the coming months, we will be taking a closer look at how the Leadership Fellows program is funded and what we can do to increase the number of fellows each year.

### **Disciples Leadership Institute (DLI)**

DLI was held in Salt Lake City this past year and was facilitated by Lonora Graves and Eli Rolon. The gathering of a diverse group of young Disciples leaders (clergy and laypersons) was a tremendous success. This program has significant potential to have a much greater impact on leadership development within the church. The primary limitation at this point is funding. In the coming months we will be looking more closely at ways to attract more funding to support this important initiative.

### **Seminarians Conference**

The seminarians conference is being redesigned as mentioned previously in this report. The committee made up of key representatives from various general units and ministries, helped re-imagine the conference and structure it in a way that would be of greater benefit to the students and to the general ministry representative. The upcoming conference will be held in March at Scarritt-Bennett.

### **Association of Disciples for Theological Discussion (ADTD)**

The most recent meeting of ADTD was held in Indianapolis at the Hospitality House at CTS. The president of HELM was able to present to the scholars, the priorities for HELM during this transitional period and discussed the possibility of doing a better job of communicating to the wider church what our Disciples scholars are doing in terms of scholarship and teaching.

### **Bethany Fellows**

The relationship with Bethany Fellows is entering a new phase. With the end of the funding from Lilly, HELM no longer has responsibility for managing the finances for BF. There are ongoing conversations with the director of the program about the possibility of future partnership between HELM and BF.

### **Ecumenical Campus Ministry Team (ECMT) –**

This gathering has not yet met during my time as president. There is a new chair and the gathering anticipates meeting in January or February. It is possible that participation in this group would make more sense if the Council on Ministries in Higher Education were functioning.

### **Hyde Park Christian Church**

HELM continues to work with Hyde Park Christian Church in Austin, Texas under the terms of the trust that established the East Scholarship Fund, which provides that HELM and the congregation have joint responsibility for the scholarship program. HELM is trustee of the fund, passes applications on to the congregation and writes the checks; the congregation reviews the applications and selects the recipients from members of the five Disciples congregations in Austin.

### **T.A. Abbott Award**

The 2014 awardee will be presented the award during inauguration celebration of the new president at Culver Stockton in April of 2015. HELM needs to develop an awards process that makes presenting the award in the same year it is made, a more viable possibility. As it currently stands, making the Award after the spring HELM board meeting makes it very difficult to find a meaningful time to present the award during the academic calendar of the school where the awardee is located.

### **Disciples Scholars Breakfast AAR/SBL**

This year's Disciples Scholar's breakfast took place in San Diego and was well attended. Over 57 people signed up for the breakfast and we had 3 additional walk-ins that we were able to accommodate. As in previous year, Chalice Press co-sponsored the breakfast and subsidized the cost of the meal to keep it reasonably priced for participants. Brad Lyons gave opening remarks about recent publications and the success of some of the changes at CBP. The HELM president presented the gathering with an overview of the current work of HELM and the priorities during this current transitional period. The feedback received suggests that there is significant excitement about the possibilities that lie ahead for HELM. Next year's gathering will be at the AAR/SBL meeting in Atlanta, GA.

## **The Councils**

### **Council on Theological Education**

- a) The president of HELM was invited by the President of Lexington Theological Seminary, Clarisse Gillette, to attend the fall board meeting of LTS and present to them an overview of what's happening at HELM and what the current priorities are during this transitional period. The board was very much interested in the work of HELM and we received a number of encouraging comments regarding the work we are doing and the prospect for closer collaboration with the theological school. Lexington received a \$250,000 grant from Lilly to study student debt. This is a really exciting opportunity, since Lilly has become more selective about making large grants and this particular grant is an affirmation of the work LTS is doing under President Gillette's leadership.
- b) The president of HELM has also visited Disciples Seminary Foundation in California at the Claremont campus and spoke to students there in December. Another visit is planned for April of 2015.
- c) The next meeting of the Council on Theological Education will take place in April.

### **Council on Ministries in Higher Education**

This council is currently not functioning but will be re-engaged in 2015. There are currently plans in place to convene a group of chaplains and directors of church relations to begin the process of restoring this council

### **Council of Colleges and Universities –**

We continue to move toward a closer working relationship with the Council of Colleges and Universities. As of this report, the HELM president has visited a number of Disciples Colleges and Universities: Transylvania University, Midway College, Lynchburg College, and Chapman University. The president of HELM also gave the 160<sup>th</sup> founder's day convocation address at Eureka College.

In January, the president attended the gathering of the council that is scheduled to take place in San Diego in January of 2015 and made a presentation of ways we can resume a closer working relationship with the council. At this meeting, the Council Colleges & Universities voted to continue its operations as previously planned through June 30, 2015 with funding support continuing as currently planned through that date. But, beginning July 1, 2015 all funds previously provided to the council by Higher Education and Leadership Ministries will once again be retained by HELM for its budgeted activities and HELM will absorb the work currently being done by the current director. Guy Waldrop will begin phasing out of his role over the next six months and the president of HELM along

with the director of development and communications will work with him on an appropriate transition.

This is an extremely positive step forward and it would not have been possible without the collaborate work of the HELM president, the Council of Colleges and University chair, Ken Garren and the director, Guy Waldrop, who all worked to ensure a successful meeting and a positive reception by the presidents.

While the funding change is a positive step, the collaborative relationship that this shift represents is even more significant. The shared communication and representation activities will be of great benefit to the colleges and universities as well as to Higher Education and Leadership Ministries. Additionally, it will greatly enhance my ability to represent HELM and seek funding for HELM's mission. Ultimately, this will be of great benefit to the church and our shared mission.

## **HELM ADMINISTRATION**

### **HELM Staffing**

The staffing of HELM has undergone significant changes over the last few years and particularly in the last few months. The retirement of Dennis Landon has lead to the need to re-prioritize various responsibilities and the upcoming retirement of Linda Plengemeier brings the need for even more extensive changes in the staffing configuration. My initial assessment of the staffing configuration has led me to the conclusion that HELM's current staffing configuration is "administratively heavy" and needs to be reconfigured to provide better support for HELM programs as well as our development and communications efforts. HELM is moving forward with transitional staffing structure that will give us the flexibility and the growth potential that HELM needs during the next two years.

### **Previous HELM Staffing**

- President
- Vice President & Treasurer
- Administrative Assistant
- Contract Assistance for Accounting
- Contract Assistance for Leadership Fellows Program

### **NEW Staffing Configuration**

- President
- Director of Development and Communications
- Director of Programs and Technology
- Office Coordinator
- Contract Assistance for Accounting

## **Facilities**

The current facilities are sufficient for HELM's current work. HELM has been in the current office space for a year and there are two remaining years on the lease. It is possible that we could consider other arrangements for office space. This needs to be assessed in relation to HELM's long-term plans for location and staffing. This will be revisited at the April Board Meeting.

## **DEVELOPMENT AND COMMUNICATIONS**

### **Development Overview**

In recent years, HELM has had some success in raising money through an annual fund and very limited success in raising funds for designated funds to support the Leadership Fellows program and other scholarships. Unfortunately, the annual fund has relied heavily on a single donor for a major part of the contributions and this donor is no longer making contributions to the annual fund. As DMF continues to decline, it is clear that HELM must look to other sources to adequately fund existing programs and grow those programs. Previous efforts to increase annual fund giving have been challenged by limited time and resource to seek out more contributions.

### **Communications**

**Newsletter** – In the past, HELM has published and distributed both printed and electronic newsletters. HELM has not done so consistently in recent years and this is due in part to staffing constraints. The previous newsletters were produced as PDF's and sent out to the database of HELM's constituents. A different newsletter format with hyperlinks that connect readers to content on the websites of various Disciples related institutions would be more robust and more interactive. Partnering with the three councils to provide content for an integrated newsletter would be an important way to represent HELM and its related constituent institutions to the wider church.

**Website** – The current website was redesigned a year ago, but remains in need of substantial redesign to match current best practices for non-profit and church related institutional websites. There is also the opportunity to save money through a coordinated website effort to support not just HELM, but the three associated councils. There are a number of key resources among the HELM leadership fellows and at Disciples related institutions to provide state-of-the-art web design as well as provide quality content for the website.

**Social Media** – The social media presence of HELM is in need of considerable attention to develop a solid social media strategy that makes sense for HELM and its institutional partners. This will be the focus of the Director of Programs and Technology

## **Summary**

The transitions taking place at HELM are helping the organization move forward through a process of strategic discernment and intentional focus. HELM looks forward to the years ahead and it will continue to work closely with the wider church to help proclaim and embody the right of God and be part of the human transformation that is the mission of the Church of Jesus Christ by developing and nurturing leaders who will renew and transform the church in the coming generation.

## **Recommended Action:**

The General Board receives the report from Higher Education and Leadership Ministries and forwards the report to the 2015 General Assembly for consideration and discussion.