

**ITEM .107
FOR ACTION**

<i>FOR PRESBYTERIAN MISSION AGENCY EXECUTIVE DIRECTOR'S OFFICE USE ONLY</i>			
A. Finance		E. Corporate Property, Legal, Finance	J. Board Nominating & Governance Subcommittee
<i>B. Justice</i>		F. PC(USA), A Corporation	P. Plenary
<i>C. Leadership</i>		G. Audit	
<i>D. Worshipping Communities</i>	X	H. Executive Committee	

Subject: Report of the Special Offerings Review Task Force

Recommendation:

The Special Offerings Review Task Force recommends:

- I. That the Presbyterian Mission Agency Executive Committee propose to the Presbyterian Mission Agency Board ~~the approval by the Presbyterian Mission Agency Board~~ to refer the following recommendations to staff for review and action:
 - 1. Evaluate the determination and communication of cost recovery percentages to staff of Special Offerings recipient programs and establish appropriate target percentages.
 - 2. Refer to the Office of the PMA Executive Director to Rre-establish the position of Director of Special Offerings.

- II. That the Executive Committee propose to the Presbyterian Mission Agency Board for submission to and approval by the 222nd General Assembly (2016).

That the 222nd General Assembly (2016):

- 1. ~~Affirm~~ Revise the \$20 million by 2020 goal for Special Offerings receipts to \$20 million by 2025 as the aspiration of the Presbyterian Church (U.S.A.)
- 2. Affirm the current interpretation and distribution of Special Offerings:
 - a. CHRISTMAS JOY OFFERING:
 - i. interpreted and received during the Advent season in gratitude for God's gift of Jesus Christ.
 - ii. Causes:
 - Assistance programs to meet identified and emerging needs for professional church workers and spouses through the Board of Pensions, 50 percent;
 - Racial ethnic education and leadership development through Racial Ethnic and Women's Ministries, 50 percent.
 - b. ONE GREAT HOUR OF SHARING:
 - i. interpreted and received during Lent and on Easter Sunday in

response to Christ's call to ministries of compassion and justice on a continuum from disaster and poverty relief to development among the marginalized and oppressed.

ii. Causes administered through the Compassion, Peace, and Justice Ministry. Causes:

- Presbyterian Disaster Assistance, 32 percent;
- Presbyterian Hunger Program, 36 percent;
- Self-Development of People, 32 percent.

c. PENTECOST OFFERING:

i. interpreted and received in relation to Pentecost Season in response to the coming of the Holy Spirit and the birth of the Church in support of ministries with youth and young adults and in response to the needs of children-at-risk.

ii. Causes:

- Theology, Formation and Evangelism, 25 percent (for Ministries with Youth);
- World Mission, 25 percent (for Young Adult Volunteer Program);
- Compassion, Peace, and Justice, 10 percent (for Educate a Child Transform the World Initiative, National)
- Retained by Congregations, 40 percent. Congregations are encouraged to use this 40 percent for local ministries for children, youth, young adults, and child advocacy.

d. PEACE & GLOBAL WITNESS OFFERING:

i. interpreted and received in relation to World Communion Sunday, recognizing the call to bring Christ's peace to all creation.

ii. Causes: Ministries that specifically include Peacemaking as well as global witness

- Presbyterian Mission Agency, 50 percent (for Peacemaking and Reconciliation)
- Synods and Presbyteries, 25 percent (12.5% presbytery/12.5% synod);
- Congregations, 25 percent;

Rationale

I. Mandate

On a four-year cycle, the Presbyterian Mission Agency is required to provide a task force for the review and evaluation of the Special Offerings and the recipient ministries and the consideration of new Special Offerings purposes in light of established criteria, for recommendation to the General Assembly. (Organization for Mission, Appendix A)

Additionally, the 221st General Assembly recommended the following additional tasks:

- A. review progress toward attaining the \$20 million by 2020 goal

- B. align offering recipients with the strategic objectives of the Presbyterian Mission Agency
- C. examine the timing and programmatic emphases within each offering based on theological soundness, the liturgical calendar, and fundraising strategy
- D. evaluate progress on the aforementioned recommendations.

II. Membership of the Special Offerings Review Task Force

Elder Michael Kruse, chair, Kansas City, Missouri; the Reverend John Koppitch, Indianapolis, Indiana; the Reverend Sarah Butter, Boston, Massachusetts; the Reverend Sallie Watson, Santa Fe, New Mexico; the Reverend Joey Lee, San Jose, California; the Reverend John Hougen, Independence, Iowa; Elder Linda Badger-Becker, Cleveland, Ohio; Staff support was provided by Margaret Hall Boone (recorder, Special Offerings) and Bryce Wiebe (Special Offerings)

III. Process

In developing recommendations for the special offerings of the Presbyterian Church (U.S.A.) for years 2018–2021, the Special Offerings Review Task Force (SORTF) completed the following process:

- Approached the task with intentional time for prayer and Bible study, seeking to discern God's will.
- Held a face-to-face meeting in September 2015, held conference calls in July 2015, August 2015, October 2015, November 2015, and December 2015 and conducted work through electronic means.
- Received correspondence and engaged in conversations with individuals with a wide variety of perspectives on the special offerings in general and on specific offerings, programs, and causes.
- Reviewed reports and met with the staff representing programs currently funded by special offerings in September 2015.
- Developed and presented the report and recommendations to the Presbyterian Mission Agency Board Executive Committee in September 2015 and February 2016.

IV. Preface

Special Offerings continues to play a vital role in the ministry of the Presbyterian Church (U.S.A.). Special Offerings generated \$12 million dollars for mission at the Presbyterian Mission Agency (PMA) in 2015, 15% of the Presbyterian Mission Agency's total income. Additionally, thousands of congregations participate in special offerings. Nearly 8,000 congregations participate in the One Great Hour of Sharing, alone. No other activity in the PC(USA) involves so many Presbyterians in one unified effort. These offerings are a vital expression of our connectionalism. The Special Offerings Review Task Force (SORTF) affirms the work of Special Offerings and we are encouraged by the staff's efforts to innovate and grow these offerings.

Yet the SORTF sees significant challenges. Along with the culture, the PC(USA) is in a time of substantial transformation. Post-denominationalism accelerates and Special Offerings are feeling the impact. Special Offerings receipts have declined from \$18.2 million in 2000, to \$16.4 million in 2007. Declines accelerated with the 2008 recession. The 218th General Assembly (2008) appointed a Special Offerings Advisory Task Force (SOATF) and charged it to do a thorough review of special offerings, with the objective of reversing the decline and improving vitality.

In 2012, the SOATF made their report to the 220th GA. This report contained many recommendations, some of which were adopted, but many were not. The GA did adopt the central SOATF proposal for a “20 by 20” campaign to increase special offering receipts to \$20 million by 2020. The GA extended the work of the SOATF until the 221st GA (2014), to be an advisor on the implementation of changes and to consider further revisions to the program. The SOATF gave their final report at the 221st General Assembly (2014).

Our Special Offerings Review Task Force (SORTF) continues to affirm the ambitious goal of raising \$20 million annually. This goal helps focus and energize the Special Offerings efforts. However, we observe that the original goal was set as part of a larger framework, several components of which were not adopted. Having lived into this effort for four years we now believe that achieving \$20 million by 2020 is not likely. Extending the goal date would yield a more realistic time frame for achieving the goal

While challenges lie ahead, we also recognize that Special Offerings have characteristics that seem particularly well-suited to our post-modern, post-denominational era.

1. Special Offerings constitute a form of designated giving which is an increasingly popular form of giving.
2. Special Offerings are clearly focused on missional goals and programs rather than institutional maintenance issues and structures, and therefore have greater donor appeal.
3. Special Offerings appeal to specific subsets of Presbyterians (for example, those interested in youth and young adults have a natural attraction to the Pentecost Offering; those concerned with aid and development are drawn to the One Great Hour of Sharing). Each offering has a capacity to serve as a rallying point for these respective interest groups within the church.
4. Special Offerings provide the Presbyterian Mission Agency Board (PMAB) with an opportunity to share financial development tools with middle governing bodies (e.g. both Peace & Global Witness and the Pentecost offerings leave a portion of the funds with congregations and/or mid councils).

With this preface in mind, we offer more specific observations about Special Offerings as a unit and then offer observations about the specific offerings. We conclude with a response to business directed to us by the Presbyterian Mission Agency Board.

V. Special Offerings

1. Marketing Oversight

In preparation for the 2015 Special Offerings, controversy developed over the marketing campaign for the One Great Hour of Sharing. Feedback from multiple stakeholders said the marketing materials were offensive. In spite of the feedback the organization moved forward with the campaign. The materials were pulled after strong objections from across the denomination were expressed.

As the Task Force reviewed the circumstances surrounding these developments, we conclude that the issues were less about a lack of input and more about failure to respond appropriately to the input from multiple angles. Appropriate measures were taken and marketing processes have been revised. While we make no additional structural recommendations in response to these matters, we wish to stress that episodes such as this fail to reflect our witness to the Gospel of Jesus Christ and cause profound damage. Trust is critical to building support and we remind senior staff of the PMA and the

church as a whole to continue learning the lessons taught by this controversy. To this end, we lift up the need for careful and responsive listening to the concerns of one another.

2. *Cost Recovery*

Staff from all the recipient programs as well as Offering staff expressed concerns about cost allocations. In 2004, the General Assembly Mission Council allocated 5% of restricted and designated revenue as a contribution to shared mission costs, not reflecting the true cost. Further decline in undesignated giving resulted in an action of the 218th General Assembly (2008) to “fairly and accurately allocate all costs associated with individual projects in the General Assembly mission budget...” to all PMA programs including recipients of Special Offerings. In the past two years, these allocations have increased in size and the costs of promotion of Special Offerings has increased. Consequently, the portion of the offerings going to overhead and fundraising have crept above the typical 10-15%. We heard a need for clarity from all staff about how this allocation works and how to interpret it to the public.

The SORTF knows this imbalance is an expected temporary outcome of ramping up Special Offerings’ fundraising capacity. Initially, the costs to the program are expected to be high but eventually the growth in donations is expected to justify the cost. While it is too early to evaluate the impact of this capacity building, new resources such as the *Presbyterian Giving Catalog* have been well received (see below). We are supportive of the expanded capacity but suggest that the next SORTF reporting to the 224th General Assembly (2020) pay close attention to how the ratio of overhead to program dollars is evolving and recommend targets be developed. We also suggest that it might be helpful for Financial Services to educate the staff in how cost recovery decisions are made and also how to better collaborate with and interpret them to constituents.

3. *Presbyterian Giving Catalog*

In 2013 and 2014 we saw wide engagement with the *Presbyterian Giving Catalog* and associated activities. Launched in 2013, the initiative was created to capitalize on research done in support of the 2012 report of the Special Offerings Advisory Task Force—the donor’s desire to make an impact in today’s world using a unique way that is both tangible and makes them feel like they’ve made a difference. The *Presbyterian Giving Catalog* includes projects/gifts that fit into categories of Livestock, Water, Agriculture, Kits and Tools, and People. By 2020, our projected annual revenue goal for this one project is \$1,040,000. Additional group activities and educational resources developed for use with the catalog should widen its appeal beyond seasonal or special gifts, and enhance its capacity to generate support and interpret mission.

The idea of the *Presbyterian Giving Catalog* is to remind donors of specific needs in the world, and provide appealing and unique ways to give in response to those needs. The strength of the idea, combined with a more comprehensive marketing approach, is yielding impressive results. Catalog activities have reached new donors to Special Offerings and increased the participation of churches and small groups (such as youth groups and Sunday school classes).

4. *Ambassador Program*

Kicked off in 2015, the Special Offerings Leader Support Network (SOLSN) is made up of volunteer Ambassadors who reach out to churches and mid councils, by phone and/or in person, to increase giving to and connection with the four church-wide Special Offerings. Ambassadors contact

churches, meet with pastors, present at Presbytery meetings, present Minutes for Mission during worship services, and so much more.

As of the writing of this report, there are twenty-five active Ambassadors (19 women and 6 men). They come from 20 different Presbyteries and range in age from 21-69 years old. Through the first two offerings of 2015 (OGHS and Pentecost), they made 630 contacts with congregation and mid council leaders. Already, these efforts are resulting in an increased awareness and understanding of the four offerings, as well as increased participation. While these initial results are promising, these efforts should continue to be monitored by Special Offerings staff as well as the PMA.

5. Special Offerings Director

At present, Special Offerings is overseen by an interim manager. While the Task Force understands this to be a temporary situation, we encourage the PMA to establish a permanent director position to oversee this work of managing more than \$12 million in giving. Special Offerings is not simply a support service. As noted, participation in special offerings is a ministry in its own right, a ministry that deepens our denominational connectedness. Special offerings require interaction and coordination among a large and diverse group of ministries and constituencies throughout multiple agencies and levels of the PC(USA). It is essential to have a unit with an eye toward developing a unified story and strategy for this diverse work as their primary objective with a seat at the table among leadership as a partner in ministry.

VI. The Specific Offerings:

1. One Great Hour of Sharing

One Great Hour of Sharing (OGHS) continues to be the largest and most widely supported of the special offerings. The offering's long interdenominational history and strong reputation has created a loyal contributor base. Presbyterian Disaster Assistance, the Presbyterian Hunger Program (PHP), and Self-Development of People (SDOP), are among the most highly esteemed programs in the denomination. Yet, the task force is mindful that we must continually connect new Presbyterians with the significance and purpose of the offering.

More can be done to communicate the overall purpose of the offering beyond the particular activities of the recipient programs. The task force understands that these three programs are ministries of compassion and justice on a continuum from disaster and poverty relief to development. A unified and well-articulated vision for the offering as a whole invites collaboration among recipient programs and reduces confusion among donors. Since the OGHS name does not clearly identify what benefits the offering delivers, we want to encourage Special Offerings to be succinctly clear about the benefit achieved through donations to the offering as a package, rather than the multiple layers of interpretation required by a federated funding model.

The Task Force continues to affirm the recipient programs as the appropriate programs for the offering. There is some concern that the SDOP program has impact in only 31 presbyteries, even though

this is a national offering. As SDOP celebrated its forty-fifth anniversary in 2015, we encourage program leaders to consider ways to revise and extend their work to more venues.

The Task Force was pleased to hear of collaborative efforts among the programs. We want to

encourage more work in that direction.

2. Pentecost Offering

The SORTF affirms the configuration of program recipients for the Pentecost Offering. We affirm the focus on ministries targeting the first third of life. We believe the transformation of the offering into a seasonal offering was a positive development. We applaud the use of social media and personal networks to advance the programs like Young Adult Volunteers, while simultaneously generating new donor streams through these approaches.

There is much passion in the denomination around youth and young adults. We believe this offering ought to connect well with congregations. However, as with most of the special offerings, the name of the offering does not describe what the offering delivers. Here again, we lift the need for staff to be succinctly clear about the benefits of the offering.

3. Peace & Global Witness

The denomination is living into this new offering and the SORTF believes this offering has great potential. The former Peacemaking Offering has been expanded into a Peace & Global Witness Offering. Through 2016, the programs historically supported by the Peacemaking Offering will be supported at past levels while any funds received beyond that level will be assigned to Global Witness. After 2016, these restrictions expire.

The SORTF wishes to emphasize the need for clarity and coherence concerning the programmatic emphases of the new offering going forward. We understand that the thrust of the offering will be towards initiatives that have both a peacemaking and global witness component, though some programs may include only one or the other. What are examples of specific programs that might receive funding? While it is true that the changes will not be felt financially until the 2017 offering, the sooner there is clarity about the specifics of the offering, the easier it will be to promote the changes when they take effect.

The SORTF also wants to affirm the practice where 25% portion of the offering that goes to mid councils is split 12.5% to presbyteries and 12.5% to synods.

4. Christmas Joy Offering

The SORTF affirms the purposes of the Christmas Joy Offering, caring for leadership in need as well as raising up new leadership. Board of Pensions assistance programs continue to play a vital role in the welfare our pastors and church workers in times of need. The need for more racial ethnic leadership in our denomination grows ever more pressing and the historically Presbyterian racial ethnic institutions continue to have a role in that objective. But as with other offerings above, the name of the offering does not describe its purpose. Again, we stress the importance for donors to quickly and easily grasp the intent of the offering.

III. Additional Recommendations Regarding the Christmas Joy Offering

The Special Offerings Review Task Force recommends that the Executive Committee propose for approval by the Presbyterian Mission Agency Board and adoption by the 222nd General Assembly (2016), that the Presbyterian Mission Agency

1. **Maintain funding to the remaining Historically Presbyterian Racial Ethnic Institutions (HPREIs) at current percentages of the Christmas Joy Offering (CJO). (As of the date of this report the HPREIs that qualify for funding through CJO are The Menaul School, Presbyterian Pan American School, and Stillman College.)**
2. **Allocate funds that have become available from HPREIs that no longer qualify for funding through the CJO to support and advance the work of Racial Ethnic and Women’s Ministry in their programs of racial ethnic leadership development.**

Rationale

The Presbyterian Mission Agency Board referred the following item from the Historically Presbyterian Racial Ethnic Institutions Task Force (HPREITF) Report to us for our review and comment.

“That the Presbyterian Mission Agency Board approve and recommend that the 222nd General Assembly (2016) approve that funds from the Christmas Joy Offering continue to be disbursed to eligible Historically Presbyterian Racial Ethnic Institutions through 2024, after which time funds will be allocated for racial ethnic leadership development programs in the Presbyterian Mission Agency.”

We affirm the report of the HPREITF as written. There is a complex history of how this recommendation came to be. We believe some background information is essential to making an informed evaluation.

I. Background:

1. Offering Purpose

The Christmas Joy Offering began at reunion in 1983, combining offerings from two predecessor denominations. The Articles of Agreement defining the offering were as follows.

Racial ethnic educational institutions have been the primary source from which racial ethnic church leadership has developed. Consistent with the dire need for racial ethnic leadership, the General Assembly Council shall propose to the General Assembly ways whereby the General Assembly shall be able to fulfill its responsibility for education through colleges and secondary schools and for meeting the operational and developmental needs of those Presbyterian schools that historically have served Black Americans and those serving other racial ethnic groups.

The emphases of racial ethnic *church* leadership and support of HPREIs were wedded together, the latter being seen as the primary means of developing the former. In 1983, there were six colleges and two secondary schools. (Today there are two secondary schools and one college who are eligible and receive funds.)

2. Task Forces

Special Offerings Advisory Task Force (SOATF)

The 219th General Assembly (2008) formed a Special Offerings Advisory Task Force (SOATF) to do a thorough examination of Special Offerings and to make recommendations for revitalizing the offerings. As noted above, offering receipts had been declining. When the SOATF made their report to the 220th General Assembly (2012), one of their recommendations was to expand the use of CJO funds beyond HPREIs to programs specifically targeted to developing and connecting racial ethnic *church* leadership.

The GA would appoint a task force of racial ethnic leaders, including leadership from the institutions, to explore how the CJO funds could be used to develop racial ethnic leadership. This component of the SOATF's recommendations was not approved.

Advisory Committee on the Allocation of Racial Ethnic Leadership Development Funds from the Christmas Joy Offering.

At the 221st General Assembly (2014), the SOATF again recommended that an Advisory Committee on the Allocation of Racial Ethnic Leadership Development Funds from the Christmas Joy Offering be established and report back the PMAB by the end of 2015. This committee was appointed and charged as follows:

Examine the implications of how the church can best

- (a) be true to its commitment to the Historically Presbyterian Racial-Ethnic Institutions with whom it has covenanted.
- (b) ensure adequate provisions for an effective program of racial ethnic leadership development for the future racial ethnic leadership needs of the church.

The Advisory Committee made two recommendations:

- (a) Maintain funding to the remaining Historically Presbyterian Racial Ethnic Institutions (HPREIs) at current percentages of the Christmas Joy Offering (CJO). As of the date of this report the HPREIs that qualify for funding through CJO are The Menaul School, Presbyterian Pan American School, and Stillman College.
- (b) Allocate funds that have become available from HPREIs that no longer qualify for funding through the CJO to support the work of the Racial Ethnic Leadership Development Office...

In short, the Advisory Committee recommendation (b) called for a consultation by 2017, including the leaders of HPREIs and other racial ethnic leaders, to determine how best to improve intercultural, interracial, and interreligious proficiencies, and other initiatives to enhance racial- ethnic leadership development. The PMAB approved the cap in funding to 2015 percentages for existing institutions in recommendation (a) and replaced recommendation (b).

Historically Presbyterian Racial Ethnic Institutions Task Force (HPREITF)

Also at the 220th General Assembly (2012), there was a request to include Bloomfield College as one of the HPREI's. It was rejected but the GA directed that the Advocacy Committee on Racial Ethnic (ACREC) Concerns "develop a brief strategy document that describes the characteristics of racial ethnic schools and colleges that produce racial ethnic leadership." (HPREI Item c.103 Background.) ACREC concluded they did not have the expertise to do such work and recommended that GA form a task force

consisting of members of the Presidents Roundtable (i.e., presidents of HPREIs) to do this work.

Parallel to these actions, the Presbyterian Mission Agency Board, at its February 2014 meeting, had discussions about how non-HPREI educational institutions might be considered for support. The Board recommended that the General Assembly create a task force to explore these issues and offer recommendations.

In response, the 221st General Assembly (2014) formed a Historically Presbyterian Racial Ethnic Institutions Task Force (HPREITF) that incorporated the aims of both recommendations into one task force. The task force members were mainly members of the Presidents Roundtable (presidents of institutions receiving CJO funds). The GA charged them with two tasks:

- 1) determine how the PC(USA) can be true to its commitment to its Historically Presbyterian Racial Ethnic Institutions while considering how other Presbyterian-related racial ethnic educational institutions can be in relationship with the PC(USA) and be considered for support
- 2) define and interpret the standards for racial ethnic schools related to the PC(USA) to be considered for support and then determine the characteristics of these schools that produce racial ethnic leaders in today's multicultural society.

They made three recommendations. The first recommendation defined the parameters of qualifying as an HPREI. The third encouraged the denomination to find innovative ways to continue the partnership with these institutions for racial ethnic education. It is their second recommendation that was of significance for the SORTF. The second recommendation reads:

“That the Presbyterian Mission Agency Board approve and recommend that the 222nd General Assembly (2016) approve that funds from the Christmas Joy Offering continue to be disbursed to eligible Historically Presbyterian Racial Ethnic Institutions through 2024, after which time funds will be allocated for racial ethnic leadership development programs in the Presbyterian Mission Agency.” (HPREI Task Force Report, Recommendation #2)

In offering this recommendation, the HPREI Task Force gives some background about HPREI's and their relationship to the denomination. They review the changing dynamics and needs for racial ethnic leadership in the denomination. Ten years from now, they see HPREIs substituting other streams of revenue for the Christmas Joy Offering, as they fulfill their critical mission of giving racial ethnic men and women a quality education in a supportive environment. The portion of the Christmas Joy Offering they currently receive would then be entirely devoted to racial ethnic leadership programs that address the expanding diversity of Presbyterian ethnic groups.

“The Task Force believes that in ten years the Historically Presbyterian Racial Ethnic Institutions will have sufficient endowments and other provisions in place that should enable them to sustain their operations without receiving funding from the Christmas Joy Offering. Therefore, the Task Force recommends that the racial ethnic schools and colleges be eligible for disbursements through 2024, after which time funds will be allocated for racial ethnic leadership programs in the Presbyterian Mission Agency. The task force also encourages the Presbyterian Church (U.S.A.) to be in partnership with the Historically Presbyterian Racial Ethnic Institutions to explore new and creative ways to support racial ethnic education, which it believes is helpful in developing racial ethnic leaders to serve the church and society.” (HPREI Task Force Report, Background on

Recommendation #2.)

The Presbyterian Mission Agency Board referred recommendation #2 to the SORTF for advice and comment.

II. Special Offerings Review Task Force (SORTF) response.

The request for advice and comment suggested to us that there was concern about the HPREITF's recommendation. The PMAB did not make their concerns explicit to the SORTF. In August of 2015, we received a letter from the Advocacy Committee on Racial Ethnic concerns, expressing opposition to the HPREITF's recommendation for ending disbursements to HPREI's. We presume the issues ACREC raised is what prompted the referral.

The SORTF spent considerable time reviewing the history of decisions that have brought to this point. The SORTF also met with the chair of the ACREC and consulted with the chairs of the various racial-ethnic caucuses. We also contacted the HPREITF for their input on the ACREC letter.

The SORTF believes there is a difference of opinion related to two overlapping but different priorities. One priority is development of racial ethnic leadership *for the church*. The other is providing quality education and a supportive environment for racial ethnic students, with no particular emphasis on Presbyterian church leadership. The former could certainly be a subset of the latter. What we heard from ACREC and the various caucuses was a desire to fund the latter. The need for both types of educational environments is great. Nevertheless, the SORTF supports the HPREITF's recommendation for directing funding toward initiatives targeting racial ethnic church leadership. Three critical observations:

1. The Special Offering Advisory Task Force (2008-2014) did extensive discernment regarding this topic and concluded there was a need to expand our racial ethnic church leadership development efforts beyond that provided through HPREIs.
2. The Advisory Committee on the Allocation of Racial Ethnic Leadership Development Funds from the Christmas Joy Offering recommended that the Christmas Joy Offering receipts going to HPREIs be frozen at current percentages, a continuation of the action taken by the 221st General Assembly (2014).
3. The Historically Presbyterian Racial Ethnic Institutions Task Force, a task force consisting mostly of presidents of HPREIs, take these recommendations a step further, in recommending that the required funding of HPREIs through the Christmas Joy Offering end in 2024 and that the CJO funds be put toward racial ethnic church leadership.

All three entities have discerned a need to shift our Christmas Joy Offering strategy toward more targeted avenues of developing racial ethnic church leadership. With regard to the HPREITF proposal, we observe that the potential streams of funding for racial ethnic education from within the denomination and beyond are likely more plentiful than are the streams willing to support development of racial ethnic Presbyterian Church (U.S.A.) leadership. Furthermore, in our review of the offering's history, we conclude that the primary objective of the offering was the development of racial ethnic *church* leadership. We must not only ask what we can do but what are we uniquely positioned to do.

The reality is that each of these three entities researched options and exercised discernment at levels

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beyond which the SORTF was charged with doing. We respect and endorse the work of these faithful servants and affirm Recommendation #2 in the HPREITF report.

Also referred to our task force from the PMAB was a request that the SORTF affirm the following:

That the Presbyterian Mission Agency Board recommends to the Special Offerings Review Task Force that the funds, which were previously designated to Cook Native American Ministries through the Christmas Joy Offering, be designated to Native American Education and Leadership from 2018-2021.

The PMAB approved this same allocation for the last quarter of 2015 through 2017

Our Special Offerings Review Task Force affirms the need for developing Native American education and leadership. We suggest that a cohesive and flexible strategy for developing racial ethnic church leadership will serve Native Americans, as well as leaders of other racial and ethnic groups. Our recommendation is intended to be inclusive of the PMAB concern. Again, we affirm the HPREIs Task Force report that CJO funds continue to be disbursed to eligible Historically Presbyterian Racial Ethnic Institutions through 2024, after which time funds will be allocated for racial ethnic leadership development programs in the Presbyterian Mission Agency.

With that said, the SORTF is concerned about the future relationship between the denomination and HPREIs. Each of these three entities has raised similar concerns in their own way. We wish to add our voice to those calling on the denomination to not lose this historic partnership in mission.



Financial Implication Cover Sheet

Report to the General Assembly

2016

A Financial Implication Cover Sheet should accompany each Report to the General Assembly (RGA).

Report Name -	Report of the Special Offerings Review Task Force answering 2014 Referral Item 08-12 Recommendation 1 and Recommendation 4.		
Agency -	PMA/Funds Development/Special Offerings	Date -	January 27, 2016
Contact -	Bryce Weibe		

1) Does the report include a recommendation(s) that has a financial impact? No

a) Please identify each recommendation and the component(s) of its cost. *

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*Meetings should detail the number of attendees, number of days and the year in which it will occur. Printed resources should detail the estimated page length and the intended distribution audience.

2) Has a General Assembly entity been asked to perform a task? If so,

a) Please identify the staff member that was consulted.

3) Will the General Assembly entity absorb the costs associated with this RGA? If so,

a) What Program(s) will be discontinued?

b) What additional sources of funding have been identified?

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