

2017 Orientation to American Baptist Life Report and Recommendations

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In consultation with Office of Travel and Conference Planning Staff

Introduction

Background

The Orientation to American Baptist Life (OTABL) welcomes and orients seminarians and ministers new to ABC. In January of 2016, a press release from the ABCUSA announced that the next OTABL will not be held as a stand-alone conference as in the past but be integrated into the 2017 Mission Summit in Portland, Oregon. This OTABL was considered an experimental effort to welcome and educate seminarians and ministers new to the ABC by having them engage with and learn from attending the Biennial Mission Summit (BMS). ABC entities who had previously participated in OTABL conferences would alter their BMS plans to include ways to educate the OTABL attendees in the context of meal events, the Hall of Ministries, plenary sessions and other gatherings.

Members of the 2017 BMS planning team and members of the OTABL planning team agreed in November 2015 to join the two events together. The National Executive Council (NEC), made up of the ABC General Secretary and Executive Directors of American Baptist Home Mission Societies, American Baptist International Ministries, American Baptist Women's Ministries, and MMBB Financial Services, requested the move because of a shortage of available funds to hold OTABL as a stand-alone conference in 2016.

Purpose

At its November 2015 meeting, the OTABL planning team affirmed the following purposes for the OTABL experience:

- To build affinity between ABC and "seminarians and ministers new to ABC"
- For "seminarians and ministers new to ABC" to feel like ABC is home
- To resource "seminarians and ministers new to ABC" for their ministries
- To tell the story of ABC (identity, history, mission, etc.)

The team also identified certain principles and outcomes to guide the planning for this OTABL:

- Relationship building
- Discipleship
- A feeling of being honored and appreciated as seminarians and ministers new to ABC
- Mentoring
- The engagement of region executive ministers and staff in more meaningful ways than in previous OTABL conferences
- Participatory learning
- The opportunity for seminarians and ministers new to ABC to meet and interact with the (human) resources that can make a difference in their ministries

Finally, the team made concrete suggestions including the following:

- Hold a welcome reception for the seminarians and ministers new to ABC on Thursday evening (6/29).
- Provide a session on Friday morning (6/30) to further orient the seminarians and new ministers to the OTABL experience.
- Assign all OTABL attendees to small groups, each with a mentor to answer questions and guide their experience during the BMS.
- Identify OTABL attendees clearly through distinctive name badges, etc.
- Use the Board luncheon events for educational purposes; ask for complimentary tickets.
- Provide a narrative ABC budget for greater clarity.
- Reframe the BMS experience for educational value, regularly asking, “why we do what we do?” Use the Hall of Ministries and other areas as teaching tools.
- Gather information from attendees before the BMS to insure that mentor groups are compatible.
- Prepare special packets for seminarians and ministers new to ABC that include reflection questions about what they’re experiencing and general tips for taking advantage of learning opportunities available at the BMS.

Roles

The National Executive Council created the position of Orientation Logistics Coordinator to oversee and manage the details of this experiment. The Rev. Holly Vincent Bean was asked to serve in this role, as an independent contractor, and began doing so early in 2016. The OTABL planning team did not disband, but was primarily advisory since much of the OTABL planning had to coordinate closely with BMS planning. The Logistics Coordinator worked closely with the Office of Travel and Conference Planning and with the BMS Staff Advisory Group on specific planning and implementation of the 2017 OTABL. This work was paid for with a stipend and expenses were covered.

To help guide the OTABL attendees through the experience, the role of mentor was also created. Region staff and some national staff were recruited to be mentors. There were 12 mentors in all, 10 were region staff and 2 were national staff from ABHMS.

Note for the future: The mentors played an important role for those who attended. The role of the mentor needs greater clarification in the future. Expectations for the mentor should also be communicated to attendees more clearly.

Process

Invitations

One of the first tasks was to determine the seminarians and new ministers to invite to 2017 OTABL. American Baptist Home Mission Societies (ABHMS) helped with seminarians. ABHMS contacted American Baptist seminaries for the names and contact information for ABC seminarians. A number of seminaries will no longer release this information because of privacy concerns, so ABHMS created a portal on their website so that seminarians could sign up, offer their own contact information and receive an invitation. Some regions also submitted seminarian names, and some were received from American Baptist Personnel Services (ABPS). In all, about 140 seminarians were sent invitations. This hardly covers the number of ABC seminarians.

Note for the future: A more strategic effort should be made to recruit seminarians not only for the invitation but also to make sure they attend. In 2017, only 10% of those invited were at OTABL.

It was determined early in the process that any seminarian or new minister who was a member of an ABC church and had not previously attended an OTABL would be eligible to attend 2017 OTABL. Because of the multiple sources of potential invitee names and the imprecise records of previous OTABL conferences, it was not always possible to screen out previous OTABL attendees.

Note for the future: Future OTABL planning could and should provide more careful screening of with potential attendees, perhaps even in the invitation letter.

The Logistics Coordinator sent multiple messages over several months to all region executives soliciting names of ministers in their regions who were new to ABC. Some regions responded in a timely way, some required a lot of prodding and some never responded. Names were also gathered from Ministers Council records, although this was not a good source because of inaccurate and outdated records. Over time, some new ministers in regions that had not submitted names learned about 2017 OTABL and asked to be invited. In all, over 260 new ministers received invitations.

Note for the future: OTABL could be publicized more widely in denominational newsletters with language like, "If you think you qualify for this conference and have not received an invitation, please contact your regional executive minister."

One very useful tool in the invitation process was Google Docs. Invitation letters were sent by Beverly Allegretti, an ABHMS staff person. She kept the invitee records on a Google Doc that was shared with the Logistics Coordinator and others. The latest information on invitations was always available in this way and did not need to be either requested or copied. This method, or something similar, will help future OTABL efforts.

Invitations were sent by mail to an initial list in November 2016. The invitation letter included a form for registration and required a \$100 nonrefundable registration fee. As more names were submitted in subsequent weeks and months, the letter and form were sent by email.

Registration

The invitations were sent when the online registration functionality was ready. The Office of Travel and Conference Planning (OTCP) prepared the online registration to coordinate with the BMS registration while remaining a distinct track. In 2016-2017, OTCP had to use Meeting Trak and coordinate it with Cvent. In the future, it seems very likely that Cvent will be used for all of the online OTABL registration, and that will make managing the registration process more efficient.

Decisions about handling meals and lodging and various choices for program were made as they arose, based on the intention that OTABL would cover all meals and lodging for OTABL attendees.

Note for the future: The following registration-related matters are suggested:

- Guide registrants with *clear, emphatic and repeated* instructions on how their registration differs from registering for BMS. A number of people did not realize that their registration fee covered Mission Summit registration as a participant, not a delegate. If they wanted to vote, they had to pay an extra fee. The registration form could say, “The OTABL registration fee (\$100) covers Mission Summit registration as a non-voting participant. For voting delegates, the OTABL registration is \$175.” If it is decided that all OTABL attendees can legally be delegates, the registration fee could simply be increased accordingly.
- Internally, plan for the OTABL to have a registration code different from that for the BMS.
- Plan for the OTABL timelines to be the same as those for the Mission Summit.
- Be very clear from the start that OTABL will pay for lodging *assuming that the attendee will room with another OTABL attendee*. (Saying, ‘double occupancy’ does not communicate that well.) This information ought to be repeated in different communications with the attendees. (For example, to specify housing choices: *I will share with another OTABL attendee, I would like a single room, I am bringing my spouse, or a guest, and I don’t need a room*, with the additional cost for each, payable at registration.)
- Plan to house all OTABL attendees in their own hotel.
- Provide a separate sheet for OTABL attendees to choose their meal events and their choices for other BMS events, such as Bible study. Do this as early as possible, even at the point of registration. In 2017, 2 meals—Saturday night dinner and Sunday night dinner—were set up in the convention center for OTABL attendees. Attendees could choose to attend any other BMS meal event and OTABL agreed to pay for it. Breakfast coupons for Saturday and Sunday at the Doubletree were offered as one of the choices. All of these options worked out well and should be considered as good possibilities for the future. The Sunday night dinner—a Farewell Dinner—could be considered just part of the program for everyone, not a choice.
- Be clear about what the registration deadline is as early as possible.
- State *early and often* when attendees need to arrive. Some people made travel arrangements for Friday, because they had somehow missed the communication about needing to arrive on Thursday afternoon.
- Require attendees to stay for the whole three days. Several people in 2017 left on Saturday – some as early as Saturday morning.

In all, about 100 individuals registered to attend OTABL. A number of cancellations resulted in the actual OTABL group totaling 85 individuals. Over 70 of those were new ministers and the rest were seminarians.

Note for the future: In 2016, it seemed that a simple letter to invite people to 2017 OTABL would suffice. It would be much better to develop an OTABL brochure to go with the

invitation letter, giving more information on OTABL, its program and guidelines for participation.

Program

OTABL used the Biennial Mission Summit as a classroom for its participants. The planners believed that OTABL attendees would learn a great deal by attending the meal events, Mission Summit conversations, evening worship, Bible study, Learning Opportunities and exploring the Hall of Ministries. In order to help focus attention and deepen the learning, OTABL gave each attendee a booklet with questions for learning and reflection. Also, each attendee was part of a mentor group, led by an experienced American Baptist leader. All of these program elements proved to be appreciated and helpful, though future events could improve how they are conducted.

OTABL attendees arrived in Portland on Thursday, June 29. The first OTABL event was a welcome reception at the Doubletree hotel. At this reception, attendees received a packet of information about OTABL, a nametag and badge holder, and registration materials they needed for the Biennial Mission Summit. In addition, Judson Press handed out a (very generous) collection of books for each attendee. Substantial hors d'oeuvres were served and staff from MMBB, ABHMS, IM and ABCUSA were introduced. In order to set this reception up, the Logistics Coordinator, with help from OTCP staff, gathered and organized all the registration materials for the OTABL attendees so that they would not need to go to the BMS registration process at the convention center. Distributing the information in this way was beneficial. However, the distribution process at the reception was awkward and somewhat confusing; more staff support would be needed for future such events.

Friday morning, July 30, the group met again at the Doubletree for breakfast (set up especially for attendees to meet the new General Secretary), a chance to meet in their mentor groups and a review and discussion of the details of the OTABL program. OTABL attendees sat at round tables in their mentor groups with their mentor. This meeting lasted for about 2 to 3 hours. The Logistics Coordinator led the beginning of the meeting, and then the mentor groups met. After that, the only gathering time offered for the OTABL group as a whole was for dinners on Saturday and Sunday night.

Note for the future: Consider setting up more sessions when the OTABL group meets by itself. In the evaluations, a number of attendees suggested that additional meeting times for OTABL attendees would improve the overall experience. Some even suggested that OTABL participants begin a day before the Mission Summit to have enough time to understand what the Mission Summit would entail and how to approach it.

Attendees were given tickets for the MMBB luncheon, the ABHMS luncheon and the IM luncheon. A special breakfast to meet the new General Secretary was sponsored by ABCUSA on Friday morning. These events were educational for the OTABL attendees since so much of the work of these boards is highlighted during these meal events. The Logistics Coordinator approached each of the boards with the request for complimentary or discounted tickets for their luncheons; OTABL attendees found the luncheons very helpful.

Note for the future: This kind of support ought to be built in to the planning and not left for the Logistics Coordinator to solicit.

Though the OTABL planning did not initially include special dinners on Saturday or Sunday evenings for OTABL attendees, the lack of other options led the planners to schedule them. They were much appreciated by the attendees and should also be built into future OTABL's.

The booklet prepared by the Logistic Coordinator specifically for OTABL attendees offered ways to focus and think about their experiences. (See attachments) In addition, each attendee was given a 'Passport', a card developed for all Mission Summit attendees directing them to various places in the Hall of Ministries. The Passport directed the holder to ask specific questions of various ABC staff, obtain a stamp to indicate that the contact had been made, and when completed, entitled the holder to enter it into a drawing for a prize. This was a very good tool for OTABL attendees and helped them contact ABC staff and learn from their experiences. (The winner of the big prize was an OTABL attendee!)

Budget

Revenue

Income for the 2017 OTABL was to come from registration fees (\$100 per attendee, nonrefundable), shared support from MMBB, United Mission funds, and contributions from IM and the REMC for the Thursday night reception. The Logistics Coordinator sought a grant from the New Ministries Initiatives Fund and was granted \$25,000. The registration fees brought in close to \$11,636. Together with the contributions from the REMC and IM totaling \$4,000. The \$25,000 New Ministries Initiative grant, \$75,000 in Shared Support from MMBB and United Mission Funds (\$50,000), a total of almost \$162,000 was available to support 2017 OTABL.

Expenses

Following are the major expenses for 2017 OTABL:

- Biennial Mission Summit registration for OTABL attendees (\$50 each) - \$4,900
- Lodging for OTABL attendees -\$34,284
- Meals for OTABL attendees - \$16,490
- Consultancy (Logistics Coordinator) - \$5,212
- Office of Travel and Conference Planning staff support -\$51,523
- Per diem labor costs - \$8,021

Several additional costs such as postage and printing bring the total cost to \$123,813. The 2017 OTABL managed to accomplish its objectives without using all the funds available. A reserve transfer of \$38,112 is available to fund future OTABL efforts.

Evaluations

The 2017 OTABL was considered experimental from the start so evaluating what happened has added importance.

The Logistics Coordinator developed an online survey with help from ABCUSA's Bridget Lipin. All those who were associated with 2017 OTABL were invited to complete

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the survey, including attendees, staff, and mentors. Out of that group, numbering about 100, 60 people replied. Following are the results.

Q1 – I attended OTABL as a

Seminarian	13.33%	8
Minister new to ABC ministry	71.67%	43
Mentor	15%	9
ABC staff member	10%	6

Q2 – I identify as a

African American	28.81%	17
European American	47.46%	28
Native American	0%	0
Haitian American	0%	0
Asian Pacific/Asian American	6.78%	4
Hispanic American	10.17%	6
Other (specify)	6.78%	4

Q3 – The purpose of OTABL is to build relationships, foster a sense of ABC identity, offer resources for ministry and share ABC history and mission. Overall, how well did your OTABL experience fulfill this purpose?

	Poorly	Fairly well	Very well	Beyond Expectations	Total	Weighted Average
Build ABC relationships	1.72% 1	13.79% 8	58.62% 34	25.86% 15	58	3.09
Foster ABC identity	0% 0	18.97% 11	46.55% 27	34.48% 20	58	3.16
Offer ministry resources	5.17% 3	15.52% 9	41.38% 24	37.93% 22	58	3.12
Share ABC history and mission	5.17% 3	20.69% 12	44.83% 26	29.31% 17	58	2.98

Q4 – Please rate the following aspects of the OTABL experience:

	Poor	Fair	Good	Beyond Expectations	N/A	Total	Weighted Average
Welcome reception June 29	1.69% 1	10.17% 6	47.46% 28	35.59% 21	5.08% 3	59	3.32
Organizing meeting June 30	1.79% 1	5.36% 3	66.07% 37	23.21% 13	3.57% 2	56	3.21
Experience with mentor	6.90% 4	13.79% 8	44.83% 26	24.14% 14	10.34% 6	58	3.17
Experience with mentor group	5.17% 3	17.24% 10	41.38% 24	32.76% 19	3.45% 2	58	3.12
Bible study	3.51%	10.52%	52.63%	15.79%	17.54%	57	3.33

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	2	6	30	9	10		
Mission conversations	1.72% 1	8.62% 5	55.17% 32	29.31% 17	5.17% 3	58	3.28
Learning Opportunity I	1.72% 1	6.90% 4	44.83% 26	29.31% 17	17.24% 10	58	3.53
Learning Opportunity II	0% 0	5.26% 3	49.12% 28	22.81% 13	22.81% 13	57	3.63
Hall of Ministries	0% 0	5.17% 3	50% 29	39.66% 23	5.17% 3	58	3.45
Worship experiences	1.75% 1	3.51% 2	38.60% 22	52.63% 30	3.51% 2	57	3.53

Note for the future: Add a space for comments to questions 3 and 4. It would be helpful to know why someone rated an experience as 'poor' or 'fair.'

Questions 5, 6 and 7 asked for comments in response.

Q5 – Which aspects of OTABL helped you the most to learn about ABC Life?

There were 51 responses to this question. Attendees cited almost all aspects of the OTABL experience, including mentor groups and mentors, meeting other ABC leaders, the Board luncheons, other meals, interactions with other ABC folks, and the resources provided. A couple of attendees commented specifically that being at the Biennial Mission Summit was a good idea.

Q6 – Which aspects of OTABL helped you the least?

There were 43 responses to this question. They ranged over a number of concerns. Many of them emphasized that there was too little time to go in depth and expected attendance at all aspects of the OTABL program was too much. Another theme that emerged is lack of clarity about how to approach the Mission Summit itself, what to expect of mentors and mentor groups, how to find time the process the experience and how much of it to try to absorb.

Q7 – What suggestions do you have for orienting the next group of seminarians and new ministers?

There were 51 responses to this question. They ranged from the need to set up expectations better (example: be sure participants know they are expected to share a room) to more time and better focus for mentors and mentor groups, to improving the organizing meeting, to setting a day before the Mission Summit begins to gather OTABL attendees for better pacing and focus, to using technical tools for better communication, to including a conversation (with Jeff Woods!) about ABC structure early on, and, mainly, to providing a way for attendees to have downtime. A number of attendees strongly and specifically affirmed having the OTABL happen at the same time as the Mission Summit.

Additional Recommendations

Based on the enthusiasm of so many OTABL attendees, their responses to the survey and my personal experiences of their attendance at the Biennial Mission Summit, I judge that the effort was a success. If it is to be done this way in the future, there are a number of improvements I recommend in addition to those that appear earlier in this report:

1. Recruitment of seminarians needs greater emphasis and effort. We had a good response from new ministers, but not enough seminarians attended.
2. Paying for lodging and meals for OTABL attendees at the Mission Summit worked well and should be continued. Attendees were asked to cover their own travel and that worked well also.
3. Since attendees made their own travel arrangements, we requested that they send us a copy of their itinerary. This practice is invaluable and should continue. The itineraries informed the staff when people were arriving late/leaving early and indicated who was driving. In addition to those who just left early, there were several east coast attendees who took red eye flights on Sunday night. Although this did not affect their conference attendance, it did affect their hotel nights.
4. Clarify who pays for what. For example:

Your OTABL registration fee covers:

- *Housing for 4 nights (arrival June 29, departure July 3) in a room shared with another OTABL attendee*
- *Mission Summit registration as a "participant" (nonvoting)*
- *Mission Summit/OTABL meals*

You are responsible to pay:

- *Transportation*
 - *½ of housing costs if you wish to have a single room or share with someone other than another OTABL attendee*
 - *Registration as a voting delegate. (Note: in Portland, we charged \$75)*
 - *Any meals you eat on your own*
5. Inquire about any translation needs early in the registration process.
 6. Clarify the expectations for the Logistics Coordinator role and compensate accordingly. This person needs to work with Office of Travel and Conference Planning more regularly and closely to share the OTABL workload. The Logistics Coordinator should be part of the Staff Advisory Group for BMS.
 7. There is no need for a planning committee for OTABL if it is to be part of BMS.
 8. Agreements for financial support from IM, ABHMS and MMBB, as well as ABCUSA, need to be worked out before the Logistics Coordinator is hired. Finding the funding for OTABL should not be part of that job description but owned by NEC. There is now enough information on the cost that a preliminary budget can be prepared and approved by the NEC.

The following supplementary information is available on request: list of 2017 attendees, results of survey, program, copy of invitation letter and registration form and a pdf of the participant booklet.