

Identifying and Sustaining Effective Clergy Leadership

A document of the Board of Ordained Ministry and the Cabinet

Oklahoma Annual Conference of the United Methodist Church

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Clergy Effectiveness in the Oklahoma Conference: A Rationale

The Executive Committee of the Oklahoma Conference Board of Ordained Ministry invited Rev. Lisa Greenwood, Vice President for Leadership Development of the Texas Methodist Foundation, to lead a board seminar on clergy effectiveness in August 2015. The board approved the creation of a task force charged with defining clergy effectiveness in the context of the Oklahoma Annual Conference. The task force was composed of select officers of the board, the Oklahoma Conference Director of Clergy Development, and professionals with experience in human resources and organizational leadership.

Using resources from the General Board of Higher Education and Ministry along with models from other annual conferences, the task force determined that there were three perspectives in this conversation: clergy, cabinet, and laity. The task force developed a survey to determine how clergy effectiveness is defined by the Oklahoma Annual Conference. The survey was distributed to the cabinet and a select group of laity. The results of the survey were shared with the Executive Committee and the cabinet. The final report was endorsed by the executive committee, which then tasked the board's candidacy and provisional committees to evaluate the board's current practices and to bring proposed recommendations to the executive committee. A select committee composed of representatives of the board, cabinet, and the Director of Clergy Development developed a strategy for the implementation of "Identifying and Sustaining Effective Clergy Leadership" based on the task force's findings and the work of the North Texas Conference Clergy Effectiveness Initiative. Their generosity and support are deeply appreciated.

Clergy Effectiveness Task Force: Our Objective

In order to more effectively achieve the mission of "making disciples of Jesus Christ for the transformation of the world," the Clergy Effectiveness Task Force set out to provide a definition of clergy effectiveness and a process for evaluating and increasing clergy effectiveness. The task force affirms the three areas of need identified by the North Texas Conference Clergy Effectiveness Initiative:

- 1. Staff/Pastor Parish Relations Training**—provide training, support and resources for local churches to partner with their pastors in reaching effectiveness.
 - Utilize gifts of laity
 - Raise expectation for S/PPRC leadership
 - Offer more frequent S/PPRC training
 - Provide good quality online training

2. Formative Process—A process for clergy to be continually formed and to grow in effectiveness:

- Based on the Marks of Fruitfulness Evaluation
- Utilized by the S/PPRC and available to the Cabinet
- S/PPRC helps clergy in formative process
- S/PPRC meets with clergy at least quarterly using Marks of Fruitfulness
- S/PPRC and clergy set goals & objectives each year and celebrate successes

3. Summative Tool—The Marks of Fruitfulness Evaluation “sums up” clergy effectiveness

- Identifies areas of strength
- Identifies areas of growth, leading to the formative process

Clergy Effectiveness Defined

“The Marks of Fruitfulness” is a formative tool for helping pastors to build capacity for **LIVING** discipleship fruitfulness, **LEADING** congregational fruitfulness and **DEVELOPING** missional fruitfulness. “The Marks of Fruitfulness” defines a common understanding of effectiveness for the Oklahoma Annual Conference. Clergy effectiveness is a combination of competencies and skills as defined below.

Living Discipleship Fruitfulness

- Spiritual Health
- Emotional & Mental Health
- Professional Health
- Fiscal Health
- Physical Health
- Relational Health

Leading Congregational Fruitfulness

- Pastoral Care
- Preaching, Sacraments, Worship Leadership
- Teaching
- Management of Self
- Management of Others
- Conflict Management
- Adaptive Leadership
- Connectional Leadership
- Relational Leadership
- Equipping Leadership
- Innovative Leadership

Developing Missional Fruitfulness

- Mission-Field Awareness and Action
- Strategic Developer
- Collaborative Connector
- Transforming Visionary
- Social Witness
- Culturally Competent

Role of the Staff/Pastor Parish Relations Committee

The role of the Staff/Pastor Parish Relations Committee includes the following, which draws from *The Book of Discipline* ¶258.2:

- To encourage, strengthen, nurture, support, and respect clergy and their family.
- To confer with and counsel clergy on the matters pertaining to the effectiveness of ministry; relationships with the congregation; the clergy's health and self-care, conditions that may impede the effectiveness of ministry and to interpret the nature and function of the ministry.
- To confer with, consult, and counsel clergy on matters pertaining to priorities in the use of gifts, skills, and time and priorities for the demands and effectiveness of the mission and ministry of the congregation.
- To complete the Marks of Fruitfulness Evaluation annually for the use of the Cabinet.
- To meet at least quarterly and use the Marks of Fruitfulness Evaluation with the pastor to identify continuing educational needs and plans.

The Marks of Fruitfulness as a Leadership Development Tool For S/PPRC Committee

The Marks of Fruitfulness Evaluation provides the clergy and S/PPRC with conversation starters about fruitful ways a clergy

- **LIVES** as a disciple,
- **LEADS** and manages the congregation, and
- **DEVELOPS** the missional reach of the staff and laity beyond the walls of the church.

Recommended utilization of the Marks of Fruitfulness (MOF) at quarterly S/PPRC meetings:

Jan–March Meeting—review the completed MOF from the prior year and have conversation on “Living Discipleship Fruitfulness.”

April–June Meeting—review the completed MOF from the prior year and have conversation on “Leading Congregational Fruitfulness.”

July–September Meeting—review the completed MOF from the prior year and have conversation on “Developing Missional Fruitfulness.”

October–December Meeting—S/PPRC and Pastor complete the annual Marks of Fruitfulness Evaluation Tool independently.

This quarterly cycle keeps the dialogue and conversation alive between the clergy and the S/PPRC throughout the entire year; otherwise the Marks of Fruitfulness Evaluation is downgraded to an annual performance review with no chance of improving communication, enhancing skills, or growing the pastor as a disciple, leader, and mission developer. Constant feedback focuses the process on formation rather than simply evaluation.

“Effectiveness” Definitions and Characteristics

Defined by the Marks of Fruitfulness

Living Discipleship Fruitfulness

Clergy are held accountable for proclaiming that Jesus is Lord and Savior with heart, mind, soul and body.

- **Spiritual Health**—attentive to continued spiritual growth; prays; fasts; reads and meditates on the Scriptures; attends to the ordinances of God; participates in an ongoing accountability group; observes Sabbath; pursues opportunities to deepen spirituality; *Fruits of the Spirit* (love, joy, peace, patience, kindness, generosity, faithfulness, gentleness, and self-control) are evident in ministry
- **Emotional/Mental Health**—experiences a high level of life satisfaction and optimism; is self-aware and maintains a sense of well-being in times of conflict; handles feedback constructively
- **Professional Health**—seeks opportunities for learning, growing and developing as a disciple and pastor
- **Fiscal Health**—is a faithful steward of personal resources; tithes; maintains manageable debt levels; is prepared for the future (will, retirement, insurance, savings, health care, housing, etc.)
- **Physical Health**—balances nutrition, exercise, work, leisure, and play; is aware of and addresses health needs; observes day off and vacation
- **Relational Health**—has a supportive network of family and friends; maintains appropriate connections and boundaries, both personally and professionally

Leading Congregational Fruitfulness

Clergy are accountable to build up the body of Christ by sharing and celebrating gifts and grace sufficient in every congregation and ministry setting.

- **Pastoral Care**—attentive and timely in visitation of those hospitalized, homebound, or in need of counsel; offers compassionate and empathetic counsel; maintains appropriate boundaries and honors confidentiality.
- **Preaching, Teaching, Sacraments, Worship Leadership**— crafts and presents organized, relevant and Biblically sound sermons; able to articulate a well-developed deep and congruent theology; articulates and administers the Sacraments; leads worship with joy.
- **Teaching**—teaches the Word; designs and facilitates small group learning opportunities; is well prepared; encourages questions.
- **Manages Self**—manages time and schedules, roles and responsibilities, sets and achieves realistic and measureable goals; utilizes resources efficiently; attends to administrative tasks in a timely and competent manner; displays a strong work ethic.
- **Manages Others**—establishes clearly defined roles and responsibilities for staff and others; sets realistic and measurable goals for staff and laity leaders; offers support and encouragement to staff and laity leaders, and helps staff and laity leaders to utilize resources efficiently; meets regularly with staff and leadership team.
- **Conflict Management**—gathers as much information as possible in order to see both sides; explores issues with those involved to find solutions that meet everyone’s needs when possible; works to keep lines of communication open; resolves conflict in a manner that does not cause harm to others.
- **Adaptive Decision-Maker**—recognizes when change is appropriate, adapts to change and leads others effectively through change; questions, obtains and uses multiple sources of data; invites and includes relevant stakeholders; learns from failure and helps others do the same; works collaboratively to solve problems; understands and accepts ambiguities to reach sound decisions.
- **Connectional Leadership**—supports and promotes the mission of the United Methodist Church; affirms the unique Wesleyan way of itinerancy, apportionments, supervision, etc.; seeks opportunities to serve within the District and Conference; connects the local church within the larger mission of the UMC.
- **Relational Leadership**—inspires others to a common purpose and vision; collaborative, inclusive and empowering in decision-making; models Christian values in making decisions; listens, informs and inspires effectively through multiple communication vehicles (i.e. spoken, written, social media, etc.); demonstrates servant leadership.
- **Equipping Leadership**—identifies, enables, empowers and equips others through coaching, teaching, delegating, and collaborating to offer their gifts and grace willingly in joyful obedience to Christ and the Church.
- **Innovative Leadership**—exhibits a creative and entrepreneurial spirit in managing and leading the congregation to strive for fruitfulness.

Developing Missional Fruitfulness

Clergy are accountable to reach, serve and transform the mission-field with words and deeds of justice, mercy and hope.

- **Mission-Field Awareness and Action**—knows the culture and demographics of the community; able to identify and respond effectively to the deepest hurts and hopes of the community; promotes and regularly participates in mission activities.
- **Strategic Developer**—has a clear, concise and consistent action plan to “make disciples of Jesus Christ for the transformation of the world”; enables, empowers and equips church leaders and laity to participate in and follow the plan.
- **Collaborative Connector**—links the congregation to other churches and community assets in covenants, partnerships and ventures to meet the needs of the community through acts of mercy and acts of justice (schools, clinics, legal aid, citizenship classes, ESL, food pantries, alliances with other denominations, etc.).
- **Transforming Visionary**—sees what is possible even when others don’t; willing to take risks and tackle obstacles; inspires, equips and empowers others to join in making the vision a reality.
- **Social Witness**—embraces the biblical prophetic witness as an example; knows and values human rights as a matter shaped by injustice/justice, peace or prejudice; has a prophetic voice in the pulpit, church and community; empowers and equips laity to be active participants in justice ministries.
- **Culturally Competent**—committed to reaching people of all ages, races and cultures; understands and responds to the diverse cultural needs of the community; seeks to be culturally competent with regard to gender, race, socio-economic status, education, sexual orientation or language.

Resources provided by the Office of Clergy Development

- Staff/Pastor Parish Relations Committees will be provided training by the conference at organized gatherings and online throughout the year.
- The S/PPRC is encouraged to utilize formative resources provided by the Office of Clergy Development in a three-year cycle, focusing one year each on Living, Leading and Developing.

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