

***Believe Again!* CLERGY STUDY TEAM REPORT**
To the 2008 Annual Conference

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CHAPTER I

Clergy Study Team for *Believe Again*
W. PA Annual Conference United Methodist Church
PRELIMINARY REPORT January, 2008

This report reflects the work of the Clergy Study Team (CST) chartered by the Believe Again Strategic Plan of W. PA Annual Conference of the United Methodist Church. The task of the CST was to be directed and driven by the mission, vision, and core values of the Annual Conference.

The Mission of the WPAUMC is to provide leadership, resources and connection to make disciples of Jesus Christ for the transformation of the world.

The Vision of the WPAUMC is to ignite a passionate spiritual connection with Christ among all peoples in Western Pennsylvania.

The Core Value of WPAUMC is love.

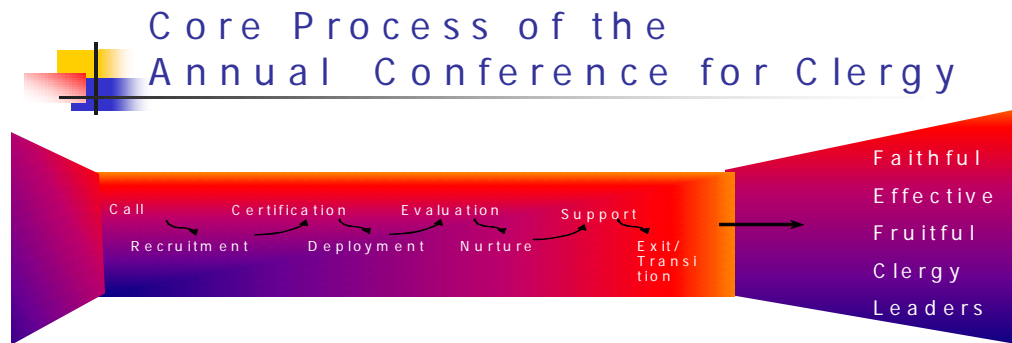
The role of the CST was to recommend and design a system for clergy leadership in the Annual Conference that would implement the mission, vision, and core values in the life of the Annual Conference. The CST met several times over the summer of 2006 and through the Spring of 2007 to define its task and responsibility. During this data-gathering period the CST examined a variety of leadership models, looked at sister Annual Conference structures and systems regarding clergy role and function, and sought best practices from social and business models. All of this was to glean information and background for developing a system of clergy leadership for W. PA. United Methodist Churches.

The mission, vision, and core values articulated by the Annual Conference have guided the parameters of the CST recommendations. The work of the CST was also framed by the requirements of the 2004 Book of Discipline of the United Methodist Church. The CST then determined that the desired outcomes of the Believe Again Clergy leadership system would be to produce faithful, effective, and fruitful clergy (FEF). These outcomes and definitions are found in Chapter II.

We then spent considerable amount of time defining FEF. The CST borrowed heavily from work that done in the Houston Area Annual Conference under Bishop Janice Huie. We are indebted to their leadership team for developing much of the FEF model in traditional Wesleyan and Discipline language. We then presented the FEF document to Bishop Bickerton and Cabinet, the Implementation Team, and the Annual Conference Board of Ordained Ministry. When all concurred on the concept, the FEF document was submitted for critique to the Clergy Session in June 2007. Responses were sought and received.

CHAPTER I

A throughput design chart was developed based on The Book of Discipline required and guided processes. Chart One depicts the throughput image, desired outcomes of FEF, and a number of subteams representing each stage in clergy process toward FEF.



Once the FEF outcomes were crystallized work on each individual subteam began in the summer of 2007. Each subteam will eventually have a series of recommendations for their area of consideration. The CST and Bishop prioritized several of these. This preliminary report has recommendations under call, recruitment, evaluation, and continuing education. All other subteams are ongoing works in progress and precise recommendations are not yet defined. The total work of the CST is a work in progress. After the system is designed much of the ongoing perfection and development of the CST will have to reside in the work of BOOM and Cabinet.

Historically and functionally the primary task of the Annual Conference is to recruit, certify, deploy, evaluate, and exit clergy leadership. It is important to remember that this core process for clergy leadership needs to be built on a solid foundation. If the core process is not solid then all other systems and processes in the Annual Conference will be weakened. The Clergy Study Team recommendations must be considered in conjunction with the recommendations of the work of the District Superintendent and District study groups

CHAPTER II

CLERGY EFFECTIVENESS

Faithful, Effective, Fruitful Clergy: A Working Definition

(revised 11-28-07)

Out of shared commitment to enhancing clergy effectiveness in and beyond the local churches throughout the WPA Annual Conference, the *Believe Again! Clergy Study Team* offers the following definition and explanation of our understanding of clergy effectiveness. All references are to paragraphs in *The Book of Discipline 2004*. Clergy leadership and effectiveness encompass all aspects of a clergyperson's life and can be demonstrated by integrity of heart and life; wholeness in building and maintaining relationships; and competence in skills necessary for ministry. Such effective clergy leadership will produce the fruits of Christian ministry: disciples of Jesus Christ transforming the world. For the purpose of this document, 'clergy' is defined according to Paragraph 140.

Paragraph 304 of the 2004 United Methodist Book of Discipline describes 'Qualities for Ordination' in the following way:

Those whom the Church ordains shall be conscious of God's call to ordained ministry, and their call shall be acknowledged and authenticated by the Church. God's call has many manifestations and the Church cannot structure a single test of authenticity. Nevertheless, the experience of the Church and the needs of its ministry require certain qualities of faith, life and practice from those who seek ordination as deacons and elders. In order that those persons who present themselves as candidates for ordained ministry are truly called of God, the Church expects persons seeking ordination to...

The paragraph then lists several qualifications and in 304.5 states that these requirements are 'minimum requirements only.' Therefore, we, the *Believe Again! Clergy Study Team* Propose this 'Working Definition of Clergy Effectiveness.'

NOTE: As the candidacy process for persons seeking ordination and those desiring to be licensed as local pastors is identical, persons serving as licensed local pastors are expected to demonstrate these same qualities of faith, life, and practice as those who are ordained with the exception for part-time local pastors of the commitment to give themselves completely to ordained ministry (304.1.c)

I. Integrity of Heart and Life

Persons who are seeking ordination or licensing or who are ordained or serving as local pastors will:

1. Have and demonstrate personal faith in God the Father, Son and Holy Spirit, be committed to Christ as Savior and Lord (304.1.a), accept that Scripture contains all things necessary for salvation through faith in God through Jesus Christ (304.1.h) and live in such a manner that the love of God is incarnate in their daily activities.

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2. Nurture and cultivate spiritual disciplines and patterns of holiness and follow these to promote personal spiritual formation. (304.1.b)
3. Acknowledge and regularly reaffirm a call by God to give themselves completely to ordained ministry following Jesus' pattern of love and service. (304.1.c)
4. Make a complete dedication of themselves to the highest ideals of the Christian life (304.2) including but not limited to:
 - a) living balanced lives which demonstrate an appropriate work ethic regarding time and attention spent in work for the congregation or agency where appointed as well as appropriate time for family, recreation and self care.
 - b) making holistic lifestyle choices and exercising responsible self-control by personal habits conducive to bodily health, mental and emotional maturity. (304.2)
 - c) being honest and forthright in all verbal and written communications (304.1.g)
 - d) demonstrating the highest integrity in financial matters both within and outside congregational or agency life (304.1.g)
5. Be self reflective regarding all aspects of spiritual formation, ministry and personal life.
6. Will be involved in an ongoing process of personal development, spiritual formation and continuing education in consultation with the Pastor Parish Relations Committee (PPRC), District Superintendent and other ministry setting supervisors (351).

II Wholeness of Relationships

Clergy with the UMC exercise their ministry within covenant relationships with God, other ordained clergy, members of the congregation or agency to which they are appointed, spouse, family and friends (303.3). Effective clergy demonstrate skills necessary to create and maintain healthy and nurturing relationships in all aspects of life.

Effective Clergy Will:

1. Exercise leadership in such a way that ministry becomes the work of the entire congregation or agency and gifts for ministry among the laity are recognized and nurtured. (220, 303.4, 328)
2. Live in covenant with the ordained ministers of the UMC (304.1.j), holding themselves accountable to a group of peers for growth in discipleship and the exercise of ministry. It is expected that this group will meet regularly and deal with issues relevant to spiritual formation and growth in ministry.
3. Meet regularly with PPRC and participate openly and honestly with PPRC in the process of evaluation (350.1) and respond appropriately when either praise or criticism is offered. In appointments to extension ministry, clergy will engage in appropriate supervisory sessions with those to whom the clergy person is accountable.

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4. Participate in annual performance review with PPRC and district superintendent. In appointments to extension ministry, yearly inventory documents will be provided by the district superintendent and will be completed by the clergyperson.
5. Exercise their ministry under appropriate supervision of the UMC through the office of the bishop and district superintendent. (421)
6. Demonstrate integrity in all personal relationships, fidelity in marriage and celibacy in singleness (304.2). Set boundaries so both single and married persons ensure that relationships are nurtured appropriately and do not become a detriment to ministry and that ministry does not have detrimental effects on relationships. Clergypersons will see that their families also are nurtured appropriately.
7. Seek out needed help when any relationship is strained or broken
8. Set appropriate boundaries in contacts with persons so that issues of sexual misconduct or harassment are never in question (2702.1.j & k)
9. Demonstrate sensitivity to issues of “race, ethnicity, gender, sexual orientation, religious affiliation, and economic status” (162)

III Competence in Skills Necessary for Ministry

Faithful, effective, fruitful clergy working in the church demonstrate gifts for ministry that allow them to make disciples of Jesus Christ, oversee ministries appropriate to their appointment and connect with those beyond the local church.

A. Skills necessary for pastoral ministry (elders, licensed local pastors)

Responsibilities and duties of Elders and Licensed Pastors

The responsibilities of elders and licensed pastors are derived from the authority given in ordination. Elders have a four-fold ministry of Word, Sacrament, Order and Service within the connection and thus serve in the church and the world. Licensed local pastors share with the elders the responsibilities and duties of a pastor for this four-fold ministry. (340)

Effective pastors demonstrate skill and giftedness far beyond minimum expectations in fulfilling the duties and responsibilities as found in Paragraph 340 in the 2004 Book of Discipline (see attached).

From among the duties listed in the Book of Discipline, we emphasize that, clergy will demonstrate skill in:

1. The servant leadership of guiding, supporting, training, and equipping laity for ministry in the world
2. Proclamation of the Word through preaching and teaching, demonstrating ability to think theologically and articulate the Wesleyan tradition

CHAPTER II

3. Pastoral care in times of illness, crisis, or death; keeping confidentiality
4. Leadership in the planning of and participation in worship and sacramental authority in accordance with disciplinary requirements
5. Prophetic leadership that calls the congregation to mission beyond its walls and justice in society including but not limited to addressing locally and globally the symptoms of poverty (including meeting short term needs of the poor) and the root causes of poverty (education, health, employment, etc.)
6. Administrative leadership in implementing the vision and purpose of the congregation, time management, supervision and management of staff and volunteers, and financial oversight
7. The use of current technology to enhance aspects of church programming and congregational life
8. Communicating what it means to be a United Methodist in the 21st century, and in leading a congregation in a United Methodist manner
9. Maintaining the connection between the local church, district, annual conference and the specialized ministries of the UMC that exist beyond the local church

B. Skills necessary for ministry beyond the local church

Deacons are persons called by God, authorized by the Church, and ordained by a bishop to a lifetime ministry of Word and Service to both the community and the congregation in a ministry that connects the two. Deacons exemplify Christian discipleship and create opportunities for others to enter into discipleship. In the world, the deacon seeks to express a ministry of compassion and justice, assisting laypersons as they claim their own ministry. In the congregation, the ministry of the deacon is to teach and to form disciples, and to lead worship together with other ordained and lay persons. (329.1)

1. Leadership in accordance with the requirements of the specialized ministry setting including guiding, supporting, training, and equipping laity for ministry in the world
2. Proclamation of the Word through preaching and teaching, demonstrating ability to think theologically and articulate the Wesleyan tradition
3. Pastoral care in times of illness, crisis, or death; keeping confidentiality
4. Prophetic leadership that calls the congregation to mission beyond its walls and justice in society including but not limited to addressing locally and globally the symptoms of poverty (including meeting short term needs of the poor) and the root causes of poverty (education, health, employment, etc.)

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5. Administrative leadership in implementing the vision and purpose of the congregation, time management, supervision and management of staff and volunteers, and financial oversight
6. The use of current technology to enhance ministry
7. Maintaining the connection between the local church, district, annual conference and the specialized ministries of the UMC that exist beyond the local church. This may include participation in worship (including weddings and funerals), sacramental assistance, and leadership in accordance with the guidelines of ordination and mission activities.

IV FRUITFULNESS: The results of faithful and effective ministry

The function of a local church, under the guidance of the Holy Spirit, is to help people to accept and confess Jesus Christ as their Lord and Savior and to live their daily lives in light of their relationship to God (202)

The local church shall be organized so that it can pursue its primary task and mission in the context of its own community - reaching out and receiving with joy all who will respond; encouraging people in their relationship with God and inviting them to commitment to God's love in Jesus Christ; providing opportunities for them to seek strengthening and growth in spiritual formation; and supporting them to live lovingly and justly in the power of the Holy Spirit as faithful disciples. (243)

Faithful and effective clergy lead the laity in ministry. Such ministry results in a local church which is guided by the Holy Spirit, fulfills its primary task and produces fruit which includes:

1. Clearly articulated mission and vision to guide all the activities in the congregation
2. Visitors participating in worship knowing that the church has welcomed them
3. Visitors returning as a result of 'radical hospitality'
4. Persons newly professing their faith in Jesus Christ and/or seeking baptism
5. Parents bringing their children for baptism and re-affirming their commitment to Christ
6. Diversity (age, race, socio-economic status, family make-up, etc.) in the worshipping community and ministry life of the congregation
7. A genuine celebration of 'the catholic spirit' (see John Wesley's sermon, "On a Catholic Spirit") and deepened understanding of our Wesleyan theological heritage
8. Church members renewing and revitalizing their commitment to God's love in Jesus Christ as evidenced by
 - Healing of inner-church conflicts, reconciliation among members
 - A renewed spirit of peace and joy in worship
 - Shared leadership among the laity in all aspects of church life

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- Passion for reaching out to the ‘unchurched’ and those often deemed culturally unacceptable
 - More consistent attendance in worship and participation in Bible studies, etc.
9. Church members building relationships with persons in the community manifested in
 - restored standing of the church as a vital part of the community
 - new people participating in church ministries and being introduced to the gospel
 - discernment of the needs of people in the community and development of ministries that meet those needs
 - transformed lives as the needs of the people in the community are being holistically met
 10. Increasing number of children and youth participating in Christian education and other gospel-centered programs/ ministries
 11. Increasing number of laity participating in training/ formation events including Lay Ministry School.
 12. Persons being called into ordained, licensed and certified lay ministry
 13. More youth and young adults serving in leadership positions in all aspects of church life
 14. Increasing numbers of adults committed to small groups that nurture spiritual formation
 15. Financial stability in the church as commitment to and trust in God is lived out in giving and tithing as modeled by the pastor
 16. Enthusiastic support of the broader mission of the United Methodist Church and its global mission including full payment of mission share.
 17. New ministries developed by empowered laity according to their gifts
 18. Ministry in collaboration with other United Methodist churches and ecumenically in the community
 19. All activities, programs and events building on and supporting the vision of the gospel and the mission of the United Methodist Church

Duties and Responsibilities of Elders and Licensed Pastors
Paragraph 340, *The Book of Discipline 2004*

1. Word and ecclesial acts:

- a) To preach the Word of God, lead in worship, read and teach the Scriptures, and engage the people in study and witness.
 - (1) To ensure faithful transmission of the Christian faith.
 - (2) To lead people in discipleship and evangelistic outreach that others might come to know Christ and to follow him.
- b) To counsel persons with personal, ethical, or spiritual struggles.
- c) To perform the ecclesial acts of marriage and burial.
 - (1) To perform the marriage ceremony after due counsel with the parties involved and in accordance with the laws of the state and the rules of The United Methodist Church. The decision to perform the ceremony shall be the right and responsibility of the pastor.
 - (2) To conduct funeral and memorial services and provide care and grief counseling.
- d) To visit in the homes of the church and the community, especially among the sick, aged, imprisoned, and others in need.
- e) To maintain all confidences inviolate, including confessional confidences except in the cases of suspected child abuse or neglect, or in cases where mandatory reporting is required by civil law.

2. Sacrament:

- a) To administer the sacraments of baptism and the Supper of the Lord according to Christ's ordinance.
 - (1) To prepare the parents and sponsors before baptizing infants or children, and instruct them concerning the significance of baptism and their responsibilities for the Christian training of the baptized child.
 - (2) To encourage reaffirmation of the baptismal covenant and renewal of baptismal vows at different stages of life.
 - (3) To encourage people baptized in infancy or early childhood to make their profession of faith, after instruction, so that they might become professing members of the church.
 - (4) To explain the meaning of the Lord's Supper and to encourage regular participation as a means of grace to grow in faith and holiness.
 - (5) To select and train deacons and lay members to serve the consecrated communion elements.
- b) To encourage the private and congregational use of the other means of grace.

3. Order:

- a) To be the administrative officer of the local church and to assure that the organizational concerns of the congregation are adequately provided for.
 - (1) To give pastoral support, guidance, and training to the lay leadership, equipping them to fulfill the ministry to which they are called.

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(2) To give oversight to the educational program of the church and encourage the use of United Methodist literature and media.

To be responsible for organizational faithfulness, goal setting, planning and evaluation.

(4) To search out and counsel men and women for the ministry of deacons, elders, local pastors and other church related ministries.

b) To administer the temporal affairs of the church in their appointment, the annual conference, and the general church.

(1) To administer the provisions of the *Discipline*.

(2) To give an account of their pastoral ministries to the charge and annual conference according to the prescribed forms.

(3) To provide leadership for the funding ministry of the congregation.

(4) To promote faithful, financial stewardship and to encourage giving as a spiritual discipline.

(5) To lead the congregation in the fulfillment of its mission through full and faithful payment of all apportioned ministerial support, administrative, and benevolent funds.

(6) To care for all church records and local church financial obligations, and certify the accuracy of all financial, membership, and any other reports submitted by the local church to the annual conference for use in apportioning costs back to the church.

c) To participate in denominational and conference programs and training opportunities.

(1) To seek out opportunities for cooperative ministries with other United Methodist pastors and churches.

(2) To be willing to assume supervisory responsibilities within the connection.

d) To lead the congregation in racial and ethnic inclusiveness.

4. Service:

a) To embody the teachings of Jesus in servant ministries and servant leadership.

b) To give diligent pastoral leadership in ordering the life of the congregation for discipleship in the world.

c) To build the body of Christ as a caring and giving community, extending the ministry of Christ to the world.

d) To participate in community, ecumenical and inter-religious concerns and to encourage the people to become so involved and to pray for the unity of the Christian community.

CHAPTER III

METHODOLOGY

Subteam (Silo) Definition

In the throughput diagram presented in Chapter I the CST delineated processes required by The Book of Discipline and Western Pennsylvania Annual Conference policy. From these processes, the CST formed seven subteams to facilitate study in each of the following areas: Call and Recruitment, Certification, Deployment, Evaluation, Nurture, Support, and Exiting or Transition. Listed on the next page are some of the various processes or requirements assigned to each subteam.

The Clergy Study Team was divided into teams to examine, study, and make recommendations regarding their area of responsibility based on research, needs, best practices in the secular world, other Annual Conferences, and throughout other denominational traditions. The recommendations were then presented and decisions regarding the various recommendations based upon the mission, core values, and vision of the *Believe Again* plan.

The Clergy Study team working on this project have been: Ron Hoellein, Pat Harbison, Sally Ernst, Debra Flint, George Gerhart, Gary Grau, Skip Green, Don Henley, Tom Kennedy, David Morse, Terry Shaughnessy, Tom Strandburg, Aimee Twigg, Bret Probert, Duane Thompson, Kim Greeway, Nan Foltz, Tracy Merrick, Bishop Tom Bickerton

CHAPTER III

Call and Recruitment:

Discernment of God's call to ministry
Identification of gifts
Steps into ministry process
Role of Pastor, DS, PPRC
Disciplinary requirements
Seminary selection
Racial inclusion
Student aid

Certification:

SPRC and Charge Conference role
District Committee function
Seminary Guidelines and
 Annual Conference expectations
Board of Ordained Ministry
Mentoring
Seminary guidelines & expectations
Probationers Program
Course of Study
Local Pastors
Deacons, Elders, Associate Members

Deployment:

Open Itinerancy
Deacon
Elder
Part Time, Full Time
Guaranteed Appointment
Extension Ministries
Itineracy
Appointment making process
Tenure
Specialist
Minimum standards for full time
Definition of part time pastor
Specialists
Bishop's expectations

Evaluation:

PPRC, DS, and Pastor's role
Annual One-on-one meetings
Continuing Formation
Career Development
Ministry plan
Formal & informal evaluations
Self-evaluation

Nurture:

Funding
Continuing education
Spouse and Family Support
Wellness
Stewardship
Lifestyle issues
Mentoring intervention
'Partners in Ministry'
Stewardship
Counseling and Therapy
Financial Management

Support:

Student debt reduction
Salary issues
Housing issues
Health Care
Pension
Travel

Exit:

Retirement
Transition
Leave of Absence
 (Voluntary or Involuntary)
Honorable Location
Career Development
Complaints and Charges

CHAPTER IV

THE CLERGY STUDY TEAM RECOMMENDATIONS

| SUBTEAM | RECOMMENDATION | A.C. RESPONSIBILITY |
|----------------------|---|--|
| Recruitment and Call | 1. Develop an intentional recruitment system for camps, youth groups, and campus ministry - with attention to diversity based on the needs of the annual conference and the mandates of the United Methodist Church | Board of Ministry |
| | 2. Renew significant investment in campus ministry as outreach from Annual Conference as component of recruitment and call. | Mission/ outreach Nurture Young adult ministry |
| Certification | 3. Develop new models of mentoring systems beyond Discipline Reports with attention to the distinction between evaluative and supportive roles | Board of Ministry |
| | 4. Articulate Seminary expectations to include leadership training and Wesleyan background beyond history, polity, and doctrine | Board of Ministry & Cabinet |
| | 5. Expect that all Probationary Candidates clearly articulate Wesleyan theology, tradition, and polity | Board of Ministry |
| | 6. Develop regional DCom's to improve quality and consistency and mandate BOM training for DCom members | Board of Ministry & Cabinet |
| Nurture | 7. Development of a 3 million dollar endowment for reducing graduate student indebtedness or for scholarship support for graduate education | Supportive, Board of Ministry |
| | 8. Implement C.E. requirements by making Olmsted Manor center for Pastoral Continuing Formation (with 'branch campuses' around the conference - Allegheny College & Wesbury already have made proposals. Olmsted Manor will provide one half position for C.E. coordinator, plan C.E. events based upon needs of pastors and DS'. This position will account for recording accumulation of C.E.U.s. | Board of Ministry Olmsted Manor Supportive |
| Evaluation | 9. DS will place focus upon management and accountability by changing role of one on sessions for the purpose of evaluation. Emphasize DS role as Superintending for assessment of weaknesses, strengths, and vision or goal implementation | Cabinet, Bishop |
| | 10. De-emphasize DS as pastoral role by development of pastoral support through area chaplaincies, peer support, or some other system. | Cabinet, Bishop |
| Support | 11. Assign a task team to examine clergy housing based upon pastoral context where housing is to be provided via parsonage, rental, or housing allowance. Develop a process to determine best housing situation for particular setting. Where parsonage is deemed essential all current parsonage standards are to be met | Cabinet, Bishop, Board of Ministry |
| | 12. Revise and update current 'Living and Working Conditions' document | Board of Ministry, Cabinet |
| | 13. Examine the current health plan to ensure that pastors in northern or rural areas to have access to medical and hospital care within a reasonable distance | Board of Pensions |
| | 14. Study the process of setting salaries for pastors. | Cabinet, Board of Ministry, Equitable Comp. Comm. |
| Exit | 15. Utilize a consistent conference-wide evaluation process that will provide for specific remedies (including programs of continuing education and formation) when there is evidence of ineffectiveness. If proposed remedies are not followed, a process that leading to complaint procedures could be initiated. | Cabinet, Bishop, Board of Ministry |
| | 16. Design an intentional strategy for funding transitions - line item in BOM and/ or cabinet budget to include items such as career counseling; health care coverage, family counseling, housing issues | Cabinet, Board of Ministry, Supportive |

CHAPTER IV

From the *Believe Again* report to the 2008 Annual Conference:

These recommendations to the 2008 Annual Conference are based on recommendations listed on the previous page and were distilled from the Implementation Team retreat in February, 2008 and a checklist developed at a subsequent meeting of the CST conveners and Bishop Bickerton.

The numbers in [brackets] reference the CST recommendations on the previous page.

Goal 3 - Lead

Expect and achieve excellence in lay and clergy leadership

Recommendations

1 – Implement a clergy evaluation process involving the District Superintendent and SPRC with an outcome of faithful, effective, fruitful clergy leadership. The process will include a DS/pastor covenant to plan approaches for addressing areas of improvement.

Implementation Plan: Clergy Study Team will ensure that BOOM and the Cabinet implement the evaluation process which has been developed by 3/31/2009.

[# 9 & # 5]

2 – Develop a system for the District Superintendents to provide non-DS pastoral support for clergy and clergy families in need

Implementation Plan: Clergy Study Team will ensure that the Bishop, BOOM and the Cabinet develop and implement this process by 6/30/2009.

[# 10]

3 – Establish Olmsted Manor as a Center for clergy and lay Continuing Education. The Center will plan and coordinate Continuing Education courses recommended by the Cabinet, SPRCs, Orders of Elder and Deacon, and Lay Ministry groups. The Center will also track Continuing Education units.

Implementation Plan: Clergy Study team will track this process and with the target for hiring a Continuing Education Coordinator of September 2008.

[# 8]

4 - Design and implement new mentoring models with BOOM and the Cabinet.

Implementation Plan: Clergy Study Team will ensure that this process begins in the Fall of 2008 and will track its process.

[# 3]

5 – Design and implement regional process for District Committees on Ministry including a joint meeting site for training, interviewing, and evaluating of the process

Implementation Plan: Clergy Study Team will track this process with a goal of implementation in the Fall of 2008.

[# 6]

6 – Increase investment in Campus Ministries as a feeder system for lay and clergy leaders

Implementation Plan: Clergy Study Team will refer this recommendation to the Bishop, current campus ministers, and the Conference Connectional Network in May 2008 with the possibility of preparing a proposal for the 2009 Annual Conference.

[# 2]

7 – Review and enhance United Methodist educational expectations of seminaries and seminary students. Develop and document expectations that all probationary candidates must be able to clearly articulate Wesleyan theology, doctrine, and tradition

Implementation Plan: Clergy Study Team will ensure that this initiative is started and will track progress toward a completion date of September 2009.

[# 4 & # 5]

CHAPTER IV

These have not been approved by the Implementation Team:

8 – Develop an intentional clergy recruitment system.

Implementation Plan: BOOM will be responsible for developing the system and the Clergy Study Team will track its progress.

[# 1]

9 - Develop a \$3 million endowment to help reduce clergy student indebtedness.

Implementation Plan: BOOM to begin working on a proposal to be presented at Annual Conference in June 2009. Clergy Study Team will track its progress.

[# 7]

10 – Appoint a team to examine clergy housing models and to update the standards for clergy living and working conditions. This document was last updated in 1981.

Implementation Plan: Bishop to appoint a team by June 2008. Clergy Study Team will provide its input to the team and will track its progress.

[# 11 & # 12]

11 – Dismantling Racism: Provide the mandatory Dismantling Racism Training as required by the action of the 2007 Annual Conference.

Implementation Plan: The Racial/Ethnic Inclusion Team has contracted with Rhymes Consulting, a group which specializes in conducting such training, to discern the issues of racism within the Annual Conference and to conduct the mandatory training in May 2008. The Racial/Ethnic Inclusion Team will monitor progress. Funding is provided in the *Believe Again!* Funding Plan and the Conference Budget. The detailed plan is included in the Racial / Ethnic Inclusion Team Report in the Appendix.

12 – Dismantling Racism: Organize and train a team which will work with Crossroads to develop a intentional long range plan for Dismantling Racism within the Annual Conference.

Implementation Plan: The Racial/Ethnic Inclusion Team has begun conversations with Crossroads to assist the Annual Conference to accomplish these steps. At the appropriate step, coordination of this work will be turned over to the Commission on Religion and Race. The detailed plan is included in the Racial / Ethnic Inclusion Team Report in the Appendix.

CHAPTER V

CALL AND RECRUITMENT

Recommendations:

1. Develop an intentional system for recruitment of persons discerning a call to ordained ministry through conference camps, youth groups, and campus ministry with attention to diversity based on the needs of the annual conference and the mandates of the United Methodist Church.
2. Renew a significant investment in campus ministry as outreach from Annual Conference as a component of recruitment.

Research/ Background Data:

Questions and answers for discussion presented by this subteam:

Q: Where does recruiting occur?

A: Local church, camps, youth ministry, annual conference, colleges including Wesley Foundations and Chaplains, seminary

Q: What issues matter to recruits:

A: Call, location, salary, opportunities, family concerns including relatives near-by

Q: How do you choose a seminary?

A: Geographical location, theology, price, denominational affiliation, mentors & pastors

Q: Why would someone choose to relocate?

A: Family, opportunity, call, 'Get out of Dodge' invited

Q: What assumptions exist?

A: Guaranteed appointment, itineracy, opportunities exist, salary package with housing

Other Thoughts:

How can we get them to say 'yes' to WPA?

Are we trying to affirm their call, fill churches, or create outstanding churches?

Could we establish summer internships that run June 1 - August 15 and pay \$4,000?

40 - 60 % of students in seminary are denomination shopping

CHAPTER VI

CERTIFICATION

Recommendations:

1. Develop new models of mentoring systems beyond Discipline Reports with attention to the distinction between evaluative and supportive roles
2. Articulate Seminary expectations to include leadership training and Wesleyan background beyond history, polity, and doctrine
3. Expect that all Probationary Candidates clearly articulate Wesleyan theology, tradition, and polity
4. Develop regional DCom's to improve quality and consistency and mandate BOM training for DCom members
5. Develop a Board of Ministry website that would serve as a centralized source of candidacy information, timelines and forms. The BOM would be responsible for setting up and maintaining this site.

Rationale:

Research/ Background Data

CHAPTER VII

DEPLOYMENT

CHAPTER VIII

EVALUATION AND CONTINUING FORMATION

EVALUATION OF CLERGY EFFECTIVENESS

Measuring and Encouraging Faithful, Effective and Fruitful Clergy Leaders

Rationale

Understanding that the

Mission of the WPAUMC is to provide *leadership*, resources and connection to make disciples for the transformation of the world,

that the

Vision is to ignite and sustain a passionate, spiritual connection with Christ among all people in Western Pennsylvania

and that our

Core Value is love,

this evaluation process under girded with love is designed to ensure that the annual conference provides *faithful, effective and fruitful clergy leaders* who are spiritually and passionately connected with Christ empowering them to ignite and sustain a passionate spiritual connection with Christ among all peoples in WPA.

Furthermore, The 2004 Book of Discipline states that the mission of the Church is to make disciples of Jesus Christ. (Para. 121)

Paragraph 122 continues; “We make disciples as we

- proclaim the gospel, seek, welcome and gather persons into the body of Christ;
- lead persons to commit their lives to God through baptism by water and the spirit and profession of faith in Jesus Christ;
- nurture persons in Christian living through worship, the sacraments, spiritual disciplines, and other means of grace, such as Wesley’s Christian conferencing;
- send persons into the world to live lovingly and justly as servants of Christ by healing the sick, feeding the hungry, caring for the stranger freeing the oppressed, being and becoming a compassionate, caring presence, and working to develop social structures that are consistent with the gospel; and
- continue the mission of seeking, welcoming and gathering persons into the community of the body of Christ.”

This evaluation process is designed to evaluate clergy’s faithfulness to the mission of *making disciples of Jesus Christ* in the context of their ministry.

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Goals

Paragraph 350 states:

“Evaluation is a continuous process for formation in servant ministry and servant leadership that must take place in a spirit of understanding and acceptance. Evaluation serves as a process for pastors to assess their effectiveness in ministry and to discern God’s call to continue in ordained ministry.”

Furthermore, Paragraph 351 states:

“Throughout their careers, clergy shall engage in continuing education for ministry, professional development, and spiritual formation and growth in order to lead the church in fulfilling the mission of making disciples for Jesus Christ. This shall include carefully developed personal programs of study augmented periodically by involvement in organized educational and spiritual growth activities.”

Therefore, the goal of this process is to measure the effectiveness of clergy in order to

- Encourage continued growth in areas of strength
- Identify areas of weakness
- Create a plan of continuing formation in order to move weaknesses to strengths and to develop new areas of strength
- Discern God’s call to continue in ministry, affirming that call or beginning the process to answer God’s call to a new direction in life
- Establish a culture of spiritual growth (sanctification) by means of evaluation, accountability, and continual formation as the normal experience of clergy leadership in the WPA Annual Conference

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Process

According to Para. 350.1, "The district superintendent, in consultation with the pastor-parish relations committee, will evaluate annually the pastors' effectiveness for ministry. This process includes the clergyperson, the District Superintendent, the Staff Pastor Parish Relations Committee (SPPRC) or the Pastor Parish Relations Committee (PPRC).

Every 3rd year, every pastor will be evaluated utilizing the process described below. One third of the clergy on a given district will be chosen by the district superintendent for this intensive process.

In the 'off' years, each pastor will

- a) be evaluated by the SPPRC/ PPRC utilizing the instrument, PASTOR'S ANNUAL EVALUATION short form (Attachment E)
- b) be evaluated by the District Superintendent utilizing the applicable steps of DISTRICT SUPERINTENDENT EVALUATION OF THE PASTOR (Attachment D)
- c) report on his/ her progress in Continuing Education/ Formation utilizing the forms provided (Attachment F)
- d) meet with the district superintendent for a 'one-on-one' interview

Newly appointed pastors should be evaluated using the intensive process in the 2nd year of appointment. Additionally, a district superintendent may require the intensive process of evaluation when he/ she deems it in the best interest of the pastor and/ or the church when pastoral effectiveness is in question in order to better identify the issues.

INTENSIVE EVALUATION PROCESS:

1. SPPRC/ PPRC Self-evaluation (in order to clarify role of this committee).
2. Congregational Assessment by Church Council with pastor (in order to provide an accurate understanding of the context of ministry and as recommended by the *Believe Again* plan for ministry).
3. SPPRC/ PPRC Evaluates the pastor utilizing the tool provided and taking into consideration No. 2 above. SECTION I and the ALL CAPS questions in SECTION II should be completed by the committee without the pastor's presence or input.
4. Pastor completes his/her questions in Section II and reads through Section III. It is recommended that the PPR encourage the pastor to take a daylong retreat for the purpose of self-evaluation.
5. Pastor and PPR meet to discuss answers in Sections I and II and together complete Section III.
6. District Superintendent dialogues with pastor at annual one-on-one regarding 3-5.
7. District Superintendent creates plan for observation of pastor and conversation with SPPRC/ PPRC as needed based on Nos. 3 - 6 above.
8. District Superintendent develops continuing formation covenant utilizing the form, 'Continuing Formation Action Plan' which includes recommendations and requirements for continuing education and formation by established dates based on 3 - 7.
9. District Superintendent assures that the pastor abides by the Continuing Formation Covenant, fulfilling the recommendations and requirements. If the covenant is broken, a letter of reprimand is sent to the pastor and PPRC/ SPRC. If, after the second year, the covenant is not fulfilled, the complaint process (Para. 362) may be initiated by the district superintendent or the local church.

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ATTACHMENTS:

A. Timeline for Evaluation Process

B. SPPRC/ PPR Self-Assessment Tool

Based on paragraphs 259.2.g.1 - 259.2.g.16

C. Pastor's Intensive Evaluation Instruments

D. District Superintendent Evaluation Tool and Checklist

E. Short Form: Pastor Evaluation

F. Continuing Education and Spiritual Formation Covenant

Continuing Formation Report Form

Continuing Formation Action Plan

TIMELINE for EVALUATION PROCESS

NOTE: This 'intensive' evaluation is completed every 3 years. The superintendent will select 1/3 of the appointed clergy on the district for evaluation each year. Continuing Formation is to be evaluated every year utilizing the appropriate forms.

Throughout the Year

The **PPRC/SPRC** observes all aspects of the pastor's ministry and congregational life

Fall (October/ November - before Church/ Charge Conference)

The **Church Council** utilizes a Congregational Assessment Tool to evaluate the strengths and weaknesses of the congregation, to establish goals and to evaluate the progress made in accomplishing the previous year's goals.

January

PPRC/SPRC meets to learn the process and to complete the self evaluation

January/ February

The **PPRC/SPRC** meets with the **Church Council** including the **pastor(s)** to discuss the 'State of the Church' based on the Congregational Assessment Tool utilized by the church.

February/ March

PPRC/SPRC meets to complete SECTION I and the ALL CAPS questions in SECTION II without the pastor's presence or input.

In consultation with the SPPRC/PPRC the **Pastor** schedules a day long retreat in order to complete his/ her questions in SECTION II and to complete the 'Continuing Formation Report' form (see Attachment F).

March/ April/ May

PPRC/SPRC meets with the **pastor** to complete Section III and to discuss the entire evaluation including continuing formation.

May 15

The **completed signed evaluation is sent** to the district office to be reviewed by the superintendent

June through Early Fall

District superintendent meets with each clergy person to review the Evaluation and to

Create a plan for observation as necessary

Establish time to meet with PPRC/SPRC as necessary

Make recommendations/ set requirements for continuing education/ formation

Hold pastor accountable to previous requirements

Take appropriate supervisory action for unmet continuing formation requirements

Late Fall

Pastors complete **Appointment Request form** and meet with district superintendent as needed regarding request for change of appointment.

PPRC/ SPRC SELF-ASSESSMENT

People serving on this committee must be engaged in and attentive to their Christian spiritual development so as to give proper leadership in the responsibilities with which the committee is entrusted. In conducting its work, the committee shall identify and clarify its values for ministry. It shall engage in biblical and theological reflections on the mission of the church, and the primary task and ministries of the local church. The committee shall reflect biblically and theologically on the role and work of the pastor(s) and staff as they carry out their leadership responsibilities. The committee shall assist the pastor(s) and staff in assessing their gifts and setting priorities for leadership and service. (259.2)

In the committee meeting, complete the assessment individually and then share the responses.

Please rate your committee according to the following duties as listed in 259.2.g

Provide examples in the space below each statement.

1. Encourages, strengthens, nurtures, supports, and respects the pastor(s) and their family(s).
 rarely 1 2 3 4 always

2. Promotes unity in the church(es)
 rarely 1 2 3 4 always

3. Confers with and counsels the pastor(s) and staff on the matters pertaining to
 a) the effectiveness of ministry
 rarely 1 2 3 4 always

b) relationships with the congregation
 rarely 1 2 2 4 always

c) conditions that may impede the effectiveness of ministry
 rarely 1 2 3 4 always

d) interpreting the nature and function of the ministry
 rarely 1 2 3 4 always

4. Confers with consults and counsels the pastor(s) in the use of gifts, skills, and time and priorities for the demands and effectiveness of the mission and ministry of the congregation.
 rarely 1 2 3 4 always

5. Provides evaluation at least annually for the use of the pastor(s) and staff in developing an ongoing effective ministry and for identifying continuing educational needs and plans.
 rarely 1 2 3 4 always

6. Communicates and interprets to the congregation the nature and function of ministry in The United Methodist Church regarding open itinerancy, the preparation for ordained ministry and the Ministerial Education Fund.

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rarely 1 2 3 4 always

7. Develops and approves written job descriptions and titles for associate pastors and other staff members in cooperation with the senior pastor.

rarely 1 2 3 4 always

8. Consults with the pastor and staff concerning

a) continuing education and spiritual renewal

rarely 1 2 3 4 always

b) arranges with the church council for the necessary time and financial assistance for the attendance of the pastor and/ or staff at such continuing education and spiritual renewal events as may foster and support their professional and spiritual growth

rarely 1 2 3 4 always

c) and encourages staff members to seek professional certification in their fields of specialization.

rarely 1 2 3 4 always

9. Enlists, interviews, evaluates, reviews and recommends annually to the charge conference

a) lay preachers and persons for candidacy for ordained ministry

rarely 1 2 3 4 always

b) candidates for missionary service

rarely 1 2 3 4 always

10. Interprets preparation for ordained ministry and the Ministerial Education Fund to the congregation.

rarely 1 2 3 4 always

11. a) Confers with the pastor and/ or other appointed members of the staff if it should become evident that the best interests of the charge and pastor(s) will be served by a change of pastors

rarely 1 2 3 4 always

b) Cooperates with the pastor(s), the district superintendent, and the bishop in securing clergy leadership.

rarely 1 2 3 4 always

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12. a) Recommends to the church council, after consultation with the pastor, the professional and other staff positions needed to carry out the work of the church or charge.

rarely 1 2 3 4 always

b) Recommends to the church council a written statement of policy and procedures regarding the process for hiring, contracting, evaluating, promoting, retiring and dismissing staff personnel who are not subject to episcopal appointment as ordained clergy.

rarely 1 2 3 4 always

13. Recommends to the charge conference, when the size of the employed staff of the charge makes it desirable, the establishment of a personnel committee.

rarely 1 2 3 4 always

14. Educates the church community on the value of diversity of selection in clergy and lay staff and develop a commitment to the same.

rarely 1 2 3 4 always

15. Keeps the committee informed of personnel matters in relationship to the Church's policy, professional standards, liability issues, and civil law.

rarely 1 2 3 4 always

16. a) Consults on matters pertaining to pulpit supply, proposals for compensation, travel expense, vacation, health and life insurance, pension, housing, and other practical matters affecting the work and families of the pastor and staff, and makes annual recommendations regarding such matters to the church council, reporting budget items to the committee on finance.

rarely 1 2 3 4 always

b) With the chairperson of the board of trustees and the pastor, the chair of this committee makes an annual review of the church-owned parsonage to assure proper maintenance

rarely 1 2 3 4 always

PASTOR'S EVALUATION

Pastor's Name: _____

Church/Charge: _____ **District:** _____

For the year _____ **Date** _____

Members of the SPRC/ PPRC participating in this evaluation _____

Please indicate date when each step of the intensive evaluation process is completed:

_____ PPRC/ SPRC meeting for the purpose of self evaluation

_____ Meeting of PPRC/ SPRC, pastor and Church Council to review State of the Church

_____ PPRC/ SPRC meeting to complete SECTION I and ALL CAPS questions in SECTION II

_____ Pastor's daylong retreat for the purpose of self-evaluation

_____ PPRC/ SPRC meeting with the pastor to complete and discuss evaluation \ including his/ her progress in continuing education/ formation

_____ Pastor meeting with district superintendent

Please indicate the date when each step of the short form evaluation process is completed:

_____ PPRC/ SPRC meeting to complete the evaluation

_____ PPRC/ SPRC meeting with the pastor to discuss the evaluation including his/ her progress in continuing education/ formation

_____ Pastor meeting with the district superintendent

Signatures:

Clergyperson _____ Date _____

PPRC/ SPRC Chairperson _____ Date _____

(print name) _____

District Superintendent _____ Date _____

SECTION I

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To measure how effectively the pastor fulfills the responsibilities and performs the duties of ministry. This section is to be completed by the PPR/SPRC and then reviewed with the clergy person.

The items below are based on Paragraph 340 of the 2004 United Methodist Book of Discipline, 'Responsibilities and Duties of Elders and Licensed Pastors.' For Deacons, see below.

Please complete this evaluation form using the following performance values for the numbers. Circle the number selected.

1= Highly Effective 2=Effective 3=Adequate 4= Needs Improvement 5=Unable to comment

Indicate in the spaces provided under the numbers one or more specific instances of initiation, accomplishment, effectiveness, inadequacy, or inaction.

* * * * *

1. *Word and ecclesial acts:*

a) To preach the Word of God, lead in worship, read and teach the Scriptures, and engage the people in study and witness.

(1) To ensure faithful transmission of the Christian faith.

(2) To lead people in discipleship and evangelistic outreach that others might come to know Christ and to follow him.

1 2 3 4 5

b) To counsel persons with personal, ethical, or spiritual struggles.

1 2 3 4 5

c) To perform the ecclesial acts of marriage and burial.

(1) To perform the marriage ceremony after due counsel with the parties involved and in accordance with the laws of the state and the rules of The United Methodist Church. The decision to perform the ceremony shall be the right and responsibility of the pastor.

1 2 3 4 5

(2) To conduct funeral and memorial services and provide care and grief counseling.

1 2 3 4 5

d) To visit in the homes of the church and the community, especially among the sick, aged, imprisoned, and others in need.

1 2 3 4 5

e) To maintain all confidences inviolate, including confessional confidences except in the cases of suspected child abuse or neglect, or in cases where mandatory reporting is required by civil law.

1 2 3 4 5

2. *Sacrament:*

a) To administer the sacraments of baptism and the Supper of the Lord according to Christ's ordinance.

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(1) To prepare the parents and sponsors before baptizing infants or children, and instruct them concerning the significance of baptism and their responsibilities for the Christian training of the baptized child.

1 2 3 4 5

(2) To encourage reaffirmation of the baptismal covenant and renewal of baptismal vows at different stages of life.

1 2 3 4 5

(3) To encourage people baptized in infancy or early childhood to make their profession of faith, after instruction, so that they might become professing members of the church.

1 2 3 4 5

(4) To explain the meaning of the Lord's Supper and to encourage regular participation as a means of grace to grow in faith and holiness.

1 2 3 4 5

(5) To select and train deacons and lay members to serve the consecrated communion elements.

1 2 3 4 5

b) To encourage the private and congregational use of the other means of grace.

1 2 3 4 5

3. Order:

a) To be the administrative officer of the local church and to assure that the organizational concerns of the congregation are adequately provided for.

(1) To give pastoral support, guidance, and training to the lay leadership, equipping them to fulfill the ministry to which they are called.

1 2 3 4 5

(2) To give oversight to the educational program of the church and encourage the use of United Methodist literature and media.

1 2 3 4 5

(3) To be responsible for organizational faithfulness, goal setting, planning and evaluation.

1 2 3 4 5

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(4) To search out and counsel men and women for the ministry of deacons, elders, local pastors and other church related ministries.

1 2 3 4 5

b) To administer the temporal affairs of the church in their appointment, the annual conference, and the general church.

(1) To administer the provisions of the *Discipline*.

1 2 3 4 5

(2) To give an account of their pastoral ministries to the charge and annual conference according to the prescribed forms.

1 2 3 4 5

(3) To provide leadership for the funding ministry of the congregation.

1 2 3 4 5

(4) To promote faithful, financial stewardship and to encourage giving as a spiritual discipline.

1 2 3 4 5

(5) To lead the congregation in the fulfillment of its mission through full and faithful payment of all apportioned ministerial support, administrative, and benevolent funds.

1 2 3 4 5

(6) To care for all church records and local church financial obligations, and certify the accuracy of all financial, membership, and any other reports submitted by the local church to the annual conference for use in apportioning costs back to the church.

1 2 3 4 5

c) To participate in denominational and conference programs and training opportunities.

1 2 3 4 5

(1) To seek out opportunities for cooperative ministries with other United Methodist pastors and churches.

1 2 3 4 5

(2) To be willing to assume supervisory responsibilities within the connection.

1 2 3 4 5

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d) To lead the congregation in racial and ethnic inclusiveness.

1 2 3 4 5

4. *Service:*

a) To embody the teachings of Jesus in servant ministries and servant leadership.

1 2 3 4 5

b) To give diligent pastoral leadership in ordering the life of the congregation for discipleship in the world.

1 2 3 4 5

c) To build the body of Christ as a caring and giving community, extending the ministry of Christ to the world.

1 2 3 4 5

d) To participate in community, ecumenical and inter-religious concerns and to encourage the people to become so involved and to pray for the unity of the Christian community.

1 2 3 4 5

5. *Additional items from Clergy Effectiveness: A Working Definition (part III Competence)*

1. The servant leadership of guiding, supporting, training, and equipping laity for ministry in the world.

1 2 3 4 5

2. Demonstrate the ability to think theologically and articulate the Wesleyan tradition.

1 2 3 4 5

3. Pastoral care in times of illness, crisis, or death.

1 2 3 4 5

4. Leadership in the planning of and participation in worship and sacramental authority in accordance with disciplinary requirements

1 2 3 4 5

5. Prophetic leadership that calls the congregation to mission beyond its walls and justice in society

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1 2 3 4 5

6. Administrative leadership in implementing the vision and purpose of the congregation, time management, supervision and management of staff and volunteers, and financial oversight

1 2 3 4 5

7. The use of current technology to enhance aspects of church programming and congregational life

1 2 3 4 5

8. Communicating what it means to be a United Methodist in the 21st century, and in leading a congregation in a United Methodist manner

1 2 3 4 5

9. Maintaining the connection between the local church, district, annual conference and the specialized ministries of the UMC that exist beyond the local church

1 2 3 4 5

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FOR DEACONS and those in MINISTRY BEYOND THE LOCAL CHURCH

Please complete this evaluation form using the following performance values for the numbers. Circle the number selected.

1=Highly Effective 2=Effective 3=Adequate 4=Needs Improvement 5=Unable to Comment

Indicate in the spaces provided under the numbers one or more specific instances of initiation, accomplishment, effectiveness, inadequacy, or inaction.

* * * * *

from Clergy Effectiveness: A Working Definition (part III Competence)

1. Leadership in accordance with the requirements of the specialized ministry setting including guiding, supporting, training, and equipping laity for ministry in the world

1 2 3 4 5

2. Proclamation of the Word through preaching and teaching, demonstrating ability to think theologically and articulate the Wesleyan tradition

1 2 3 4 5

3. Pastoral care in times of illness, crisis, or death; keeping confidentiality

1 2 3 4 5

4. Prophetic leadership that calls the congregation to mission beyond its walls and justice in society

1 2 3 4 5

5. Administrative leadership in implementing the vision and purpose of the congregation, time management, supervision and management of staff and volunteers, and financial oversight

1 2 3 4 5

6. The use of current technology to enhance ministry

1 2 3 4 5

7. Maintaining the connection between the local church, district, annual conference and the specialized ministries of the UMC that exist beyond the local church. This may include participation in worship (including weddings and funerals), sacramental assistance, and leadership in accordance with the guidelines of ordination and mission activities.

1 2 3 4 5

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SECTION II

This section relates directly to the “Clergy Effectiveness: A Working Definition” document which grows out of Paragraph 304 of the 2004 United Methodist Book of Discipline. It is intended to guide a conversation between the PPRC and the pastor. Questions (a) in normal type are to be answered by the pastor while questions in all caps are to be answered by the committee members.

I. Integrity of Heart and Life:

1. How is the love of God demonstrated in your daily activities?

IN WHAT WAYS DO YOU OBSERVE YOUR PASTOR’S FAITH MANIFESTED IN THE WAYS HE/ SHE LIVES? HOW IS THE LOVE OF GOD DEMONSTRATED IN YOUR PASTOR’S DAILY ACTIVITIES?

2. What Spiritual disciplines are you employing in your personal spiritual formation?

HOW IS THE PPRC/ SPRC ENCOURAGING AND SUPPORTING YOUR PASTOR IN HIS/ HER PRACTICES OF THE SPIRITUAL DISCIPLINES?

3. Are you giving yourself completely to God through your response to the call to ministry?

DOES YOUR PASTOR DEMONSTRATE A COMPLETE DEDICATION TO MINISTRY FOLLOWING JESUS’ PATTERN OF LOVE AND SERVICE?

4. Are you dedicated to the highest ideals of the Christian life?

- 4a. How do you manage your time in a way that demonstrates both an appropriate work ethic and attention to family balanced with Sabbath and recreation?

HOW DOES THE PPRC/ SPRC PROMOTE AND SUPPORT YOUR PASTOR’S BALANCED TIME MANAGEMENT?

- 4b. How do you care for your physical and emotional health?

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DOES THE CHURCH ALLOW YOUR PASTOR ADEQUATE OPPORTUNITY TO CARE FOR HIS/ HER PHYSICAL AND EMOTIONAL HEALTH? PARTICULARLY, DOES YOUR PASTOR ENGAGE IN REGULAR SABBATH, VACATION AND RENEWAL TIMES?

4c. Are you honest and forthright in your verbal and written communications?

IN WHAT WAYS DOES THE PASTOR DEMONSTRATE HONESTY, CLARITY AND OPENESS IN HIS/ HER VERBAL AND WRITTEN COMMUNICATIONS?

4d. Have you experienced any financial difficulties within the church in the last year? What steps have you taken to remedy the situation?

DOES YOUR PASTOR DEMONSTRATE THE HIGHEST INTEGRITY IN FINANCIAL MATTERS?

5. Are you self reflective regarding all aspects of spiritual formation, ministry and personal life?

6. Are you dedicated to an ongoing process of personal development, spiritual formation and continuing education? Please review Attachment F “Continuing Education and Formation Covenant’ and complete the “Continuing Formation Report Form’ found at the end of the attachment.

HOW DOES THE PPRC/ SPRC HOLD THE PASTOR ACCOUNTABLE TO ONGOING FORMATION?

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II. Wholeness of Relationships

1. How do you identify, recognize and utilize the gifts of the laity for ministry?

DOES THE PASTOR LEAD IN SUCH A WAY THAT THE CONGREGATION UNDERSTANDS THAT FAITHFUL MINISTRY IS NOT 'PASTOR-CENTERED'?

IN WHAT WAYS ARE THE LAITY OF THE CONGREGATION EMPOWERED TO DO MINISTRY?

2. Are you part of a covenant and/ or accountability group that promotes self-reflection regarding all aspects of your spiritual formation, ministry and personal life? How often do you meet?

HOW IS THE PPRC ENCOURAGING AND HOLDING THE PASTOR ACCOUNTABLE TO PARTICIPATION IN A COVENANT AND/ OR ACCOUNTABILITY GROUP?

3-4. How do you respond to criticism? Are you willing to engage in honest and open conversation with the PPRC/ SPRC and/ or the district superintendent regarding your evaluation?

HOW DOES YOUR PASTOR RESPOND TO CRITICISM AND PRAISE?

IS YOUR COMMITTEE WILLING TO ENGAGE IN OPEN AND HONEST CONVERSATIONS WITH YOUR PASTOR?

5. Do you receive adequate support, encouragement and supervision by the district superintendent?

DOES YOUR PASTOR RESPECT, PROMOTE AND SUPPORT THE MINISTRY OF THE ANNUAL CONFERENCE?

6. Are you committed to fidelity in marriage and celibacy in singleness?

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How do you nurture your closest relationships?

DOES YOUR PASTOR DEMONSTRATE THE HIGHEST LEVEL OF INTEGRITY IN ALL PERSONAL RELATIONSHIPS?

7. To whom do you turn for help when your personal relationships are strained or broken?

IS YOUR PASTOR WILLING TO SEEK HELP WHEN RELATIONSHIPS ARE STRAINED OR BROKEN?

8. Have you established and hold to appropriate boundaries so that issues of sexual misconduct or harassment are never in question?

Have you completed mandatory 'boundaries' training?

IS THE CONGREGATION AWARE OF APPROPRIATE BOUNDARIES ON THE PASTOR'S TIME AND IN CONTACTS WITH THE PASTOR? HOW DOES THE PPRC/SPRC TEACH THE PROPER UNDERSTANDING/

9. Do you preach and teach inclusivity and sensitivity to issues of 'race, ethnicity, gender, sexual orientation, religious affiliation or economic status?

DOES THE PASTOR PROMOTE THE UNITED METHODIST WAY OF OPEN HEARTS, OPEN MINDS, OPEN DOORS?

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SECTION III

Fruitfulness:

Metrics based on desired outcomes - that is, what will I see if this pastor is faithful and effective?

What are the evident fruits of this pastor's leadership? How many new disciples have been made (not just POF) but how many are making significant progress in their personal spiritual lives? What evidence is there of persons lives being transformed?

Please answer the following questions listed below each statement from 'Clergy Effectiveness: A Working Definition' using both numbers, narrative and examples:

* * * * *

1. Mission and vision
 - a) Does the church have a clearly articulated mission and vision?

 - b) Does the congregation understand and know the mission and vision of the church?

2. Do visitors in worship know that the church has 'made space for them'
 - a) How often are there visitors in worship? How many?

 - b) What percentage of the average worshipping congregation are non-members?

 - c) What specific provisions are made for visitors to feel welcome and a part of the congregation?

3. Worship visitors returning as a result of 'radical hospitality'
 - a) How often do visitors return to worship?

 - b) How are visitors 'tracked'? What is done to 'follow up' on repeat visitors?

4. Persons newly professing faith in Jesus Christ
 - a) How many persons were welcomed into the congregation by profession of faith this year?

 - b) How many youth were confirmed this year?

 - c) How many adults were baptized this year?

5. Parents, bringing their children for baptism and re-affirming their commitment to Christ
 - a) How many children were baptized this year?

 - b) How many parents of baptized children became re-active in the life of the church?

6. Diversity (age, race, socio-economic status, family make-up, etc.) in the worshipping community and ministry life of the congregation

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a) What diversity is present in the community? How much does the congregation reflect the composition of the community?

b) What diversity is evident in the congregation (worship and ministries)?

7. Wesleyan theological heritage

a) What classes on Methodism and our Wesleyan heritage have been offered in your congregation in the past year? How many persons participated?

b) How often does the pastor refer to John Wesley or emphasize our theological heritage in preaching and teaching?

8. Church members renewing and revitalizing their commitment to God's love in Jesus Christ manifest in

- Healing of inner-church conflicts, reconciliation among members
 - a) Is there 'peace and harmony' among the membership?

- A renewed spirit of peace and joy in worship
 - a) Is worship joyful and spirit-filled?

- Shared leadership among the laity in all aspects of church life
 - a) Is the diversity in the congregation reflected in the elected leadership?

 - b) Are newer members trained and becoming leaders in the congregation?

 - c) Are all members encouraged in ministry?

 - d) Is there a plan for intentional leadership development?

- Passion for reaching the 'unchurched'
 - a) What is the desire and intentionality among church members regarding outreach and evangelism?

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b) How are church members interacting and building relationships with persons 'outside the body'?

- More consistent attendance in worship and participation in Bible studies, small groups etc.
 - a) Is worship, Sunday School, etc. attendance consistent?

9. Church members building relationships with persons in the community manifest in

- restored standing of the church as a vital part of the community
 - a) Do the people in the community surrounding the church know about its ministries?
 - b) For what is the church known among its neighbors?
 - new people participating in church ministries and being introduced to the gospel
 - a) Is the gospel shared with those who participate in the churches ministries/ programs?
How? By whom?

b) Do persons from the community who attend church functions inquire about faith, or the ministries?

- discernment of the needs of people in the community and development of ministries that meets those needs
 - a) Are ministries designed based on research into community needs?

b) What ministries are meeting community needs and thus witnessing to the gospel?

- transformed lives as the needs of the people in the community being holistically met
 - a) Has the church received positive response from the community? How?

b) Name persons whose lives have been transformed by the church's ministry and describe the transformation.

10. Increasing number of children and youth participating in Christian education and other gospel-centered programs/ ministries

- a) How many children and youth are a part of the church's life? Is this an increase or decrease over the previous year?

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- b) What new ministries are designed specifically for youth and children?
11. Increasing numbers of adults committed to small groups that nurture spiritual formation
- a) How many adults regularly participate in small groups that nurture spiritual formation?
Is this an increase or decrease over the last year?
- b) Describe any transformation in the church as a result of person's participation in small accountability groups.
12. Persons being called into ministry.
- a) In the last three years, who has been called out of your congregation and answered the call to ordained, licensed and/ or certified lay ministry.
13. Youth and young adults in leadership
- a) List the names and approximate ages and position of youth and young adults in leadership positions in the church.
14. Small groups and spiritual formation.
- a) Describe the small groups that meet in your congregation.
- b) How many persons are committed to regular participation in these groups?
15. Financial stability in the church as commitment to and trust in God is lived out in giving and tithing
- a) Has per capita financial support of the church increased or decreased over the last year?
- b) What percentage of your membership tithes?
- c) How often does the pastor discuss/ mention stewardship and tithing in preaching and teaching?
16. Connectionalism
- a) List mission share and percentage paid in the last 3 years?
- b) List ways that the pastor promotes the broader mission of the United Methodist Church.
17. New ministries

CHAPTER VIII

- a) What new ministries have begun over the last year?
 - b) Have there been additional worship services or has the worship changed to accommodate cultural changes?
 - c) List new ministries that have been conceived and carried out by the laity and the ways in which the pastor encouraged and supported these ministries.
18. Ministry done in collaboration with other United Methodist churches
- a) What ministry has been done in collaboration with other United Methodist churches in the region?
19. All activities, programs and events building on and supporting the mission and vision of the church
- a) Are all activities regularly evaluated for their adherence to the mission and vision of the church?
 - b) Have any programs been 'allowed to die' or eliminated because they did not conform to the mission and vision of the church?

DISTRICT SUPERINTENDENT EVALUATION OF THE PASTOR

PASTOR _____ STATUS _____

APPOINTMENT _____ Years in this appointment _____

DISTRICT SUPERINTENDENT _____

Indicate date when each step is completed:

- _____ 1a. Review the PPRC/ SPRC self-assessment.
- _____ 1b. (optional) Meet with the committee for clarification of its role as necessary.
- _____ 2a. Review the congregational assessment
- _____ 2b. (optional) Discuss this assessment with PPRC or Church Council chair as needed.
- _____ 3. Review the completed 'Pastor's Evaluation Tool'
- _____ 4. Meet with the pastor (annual 'one-on-one') to discuss the above with emphasis on continuing formation:
receiving and reviewing the continuing formation covenant
(including and emphasizing requirements established the previous year)
and making recommendations for further continuing formation.
- _____ 6. If remediation is necessary:
Develop a plan for observation
Establish a time to meet with the PPRC/ SPRC
Set requirements for continuing education/ formation
- _____ 7. (optional) Mid-year meeting with pastor to review progress in continuing education and formation requirements established in #6 above

The Annual One-on-One Interview

In addition to performance review utilizing the evaluation tools mentioned above, the following questions might be asked:

- 1. What makes you believe that God continues to call you to this ministry?
- 2. What gifts do you bring to ordained/ licensed ministry?
- 3. What learning do you need?
- 4. What have you been doing?
- 5. What are the fruits of your ministry?
- 6. What have you been learning?
- 7. What relationships do you need to build or improve as you move along?
- 8. Do you regularly meet with an accountability group?

Questions regarding appointment will be addressed following the receipt of the 'Appointment Request Form' by the district office in the late fall.

Annual review of CE Report Form

**Western Pennsylvania Annual Conference
Clergy Evaluation Form for Clergy Appointed to Serve Churches - Short Form**

| | |
|--------------------------------|------------------|
| Clergy's Name | Date: |
| Appointment | District: |
| SPRC Chairperson | |
| District Superintendent | |

Evaluation of Faithful, Effective, Fruitful Clergy:

| Faithful | 1-Highly Faithful | 2-Faithful | 3-Adequate | 4-Needs Improvement | 5-Unable to Comment | 1 | 2 | 3 | 4 | 5 |
|----------------------------|---|-------------------|-------------------|----------------------------|----------------------------|----------|----------|----------|----------|----------|
| Call / Using Gifts | Faithfully responds to God's call to ministry utilizing the gifts God has given him / her | | | | | | | | | |
| Personal Spiritual Journey | Faithfully takes time for the spiritual disciplines in living and modeling his / her own personal spiritual journey | | | | | | | | | |
| Health as Wholeness | Faithfully cares for all aspects of his / her health: spiritual, physical, mental, emotional, social, and financial | | | | | | | | | |
| Theology | Faithfully preaches, teaches, and lives out a Christian theology consistent with the Wesleyan tradition | | | | | | | | | |
| Core Value | Faithfully lives and models the Core Value of the Annual Conference, love of God and love for all people | | | | | | | | | |
| Visitation | Faithfully visits in hospitals, homes, and in cases of need, in person or ensures that visitation occurs | | | | | | | | | |

| Effective | 1-Highly Effective | 2-Effective | 3-Adequate | 4-Needs Improvement | 5-Unable to Comment | 1 | 2 | 3 | 4 | 5 |
|------------------|---|--------------------|-------------------|----------------------------|----------------------------|----------|----------|----------|----------|----------|
| Preacher | Effectively prepares and presents clear, inspirational, and challenging sermons / messages appropriate to the setting | | | | | | | | | |
| Teacher | Effectively prepares and leads education sessions which draw participants into a deeper relationship with Christ | | | | | | | | | |
| Leader | Effectively leads in the discernment of vision / mission and in the development / implementation of plans for ministry | | | | | | | | | |
| Counsellor | Effectively counsels persons with personal, ethical, or spiritual struggles, makes appropriate referrals, and maintains confidentiality | | | | | | | | | |
| Administrator | Effectively oversees the organization, finances, and building, so that they provide maximum support to ministry | | | | | | | | | |

| Fruitful | 1-Highly Fruitful | 2-Fruitful | 3-Adequate | 4-Needs Improvement | 5-Unable to Comment | 1 | 2 | 3 | 4 | 5 |
|------------------------|---|-------------------|-------------------|----------------------------|----------------------------|----------|----------|----------|----------|----------|
| New Members | Ministry results in new members joining the church; number of new members which joined thus far this year _____ | | | | | | | | | |
| Spiritual Development | Ministry results in deepening the spiritual walk of the members; number of educational settings taught this year _____ | | | | | | | | | |
| Leadership Development | Ministry results in developing leadership skills and effectiveness of laity ; number of laity actively involved in ministry _____ | | | | | | | | | |
| Service | Ministry is marked by leading and personal participation in missions / community service; number of service participations _____ | | | | | | | | | |
| Inclusion | Ministry includes individuals of varying backgrounds including race, ethnicity, level of education, financial resources, etc. | | | | | | | | | |

Overall Evaluation (Check one)

Highly Faithful, Effective, Fruitful _____

Faithful, Effective, Fruitful _____

Adequate _____

Needs Improvement _____

Clergy Evaluation Form - Clergy Appointed to Serve Churches

Explanation of Ratings, especially any ratings of NI (Needs Improvement):

Clergy's Ministry goals for last 12 months: list and evaluate levels of completion

Clergy's Ministry goals for next 12 months

Summarize career development plan and continuing education plan for last 12 months and evaluate completion

Identify career development plan and continuing education plan for next 12 months (Plans for addressing any ratings of NI need to be included)

Clergy Evaluation Form - Clergy Appointed to Serve Churches

Comments - SPRC

Comments - District Superintendent

Comments - Pastor (optional, unless disagreement)

Signatures: By signing below, the SPRC Chairperson, the Clergy, and the District Superintendent affirm the covenant that this evaluation represents and confirm that all three parties have discussed the contents of the evaluation.

Clergy _____ **Date** _____

SPRC Chairperson _____ **Date** _____

District Superintendent _____ **Date** _____

Guidelines for completing this form:

- The purpose of the evaluation process is to encourage open dialogue between the pastor, the SPRC, and the District Superintendent concerning the pastor's effectiveness.
- The form should be completed by the SPRC as a whole, not just the chairperson.
- The long form evaluation form will be used periodically when deemed appropriate by the District Superintendent and when there are any "Needs Improvement" ratings to facilitate support a more comprehensive discussion and evaluation
- The short form will be used during the first year of an appointment as a conversation tool and in years when the District Superintendent doesn't indicate that the long form is needed.
- Page 1 is intended as an evaluation of how well the pastor meets the expectations of faithful, effective, and fruitful clergy leadership. Each category should be checked. If the SPRC senses that it cannot provide a rating, then the "Unable to comment" box should be used.
- Page 2 should be used to explain any Needs Improvement ratings and to a) evaluate the clergy's progress toward achieving the goals established during the previous evaluation, b) define the goals for the next 12 months, c) evaluate progress toward completing career development plan and continuing education plan steps defined during the last evaluation, and d) define the career development plan and continuing education plan steps for the next 12 months.
- Page 3 provides space where the the SPRC, the District Superintendent, and the Clergy person are encouraged to make additional comments. If the Clergy person has any concerns or disagreement with the evaluation, they should be noted on page 3.

**Continuing Education and Spiritual Formation Covenant
To Equip the Clergy in the Western Pennsylvania Conference of
The United Methodist Church for Faithful, Effective and Fruitful Ministry**

(as proposed by the Clergy Study Team of the WPAUMC Believe Again! Plan for Ministry)

Chapter I I. STATEMENT OF PURPOSE

This Covenant is intended to motivate all clergy to participate in continuous study, education and spiritual formation; the intent is to encourage and enable life-long learning, leading to growth in faithfulness, effectiveness and fruitfulness throughout the career of each clergy person.

While the primary responsibility for continuing education and spiritual formation rests with the individual who designs his/her own program, it is also a part of the responsibility of a Staff/Pastor-Parish Relations Committee (S/PPRC), in consultation with the District Superintendent, to assist the clergy person in the development of a continuing education and spiritual formation program and a financial plan to achieve that program.

Chapter II II. DISCIPLINARY REQUIREMENTS

Paragraph 351 of the 2004 *Book of Discipline* states:

- A. Throughout their careers, clergy shall engage in continuing education for ministry, professional development, and spiritual formation and growth in order to lead the church in fulfilling the mission of making disciples for Jesus Christ. This shall include carefully developed personal programs of study augmented periodically by involvement in organized educational and spiritual growth activities.
- B. A clergy member's continuing education and spiritual growth program should include such leaves at least one week each year and at least one month during one year of every quadrennium. Such leaves shall not be considered as part of the ministers' vacations and shall be planned in consultation with their charges or other agencies to which they are appointed as well as the bishop, district superintendent, and annual conference continuing education committee.
- C. A clergy member may request a formational and spiritual growth leave of up to six months while continuing to hold an appointment in the local church. Such leaves are available to clergy members who have held full-time appointments for at least six (6) years. Such a leave shall be with the approval of the S/PPRC, the church council, and the district superintendent. Annual conferences are encouraged to assist with pulpit supply and other temporary support for such leaves.
- D. Financial arrangements for continuing education as part of one's professional development, formation, and spiritual growth shall be negotiated in the following manner: (1) for elders and local pastors it shall be done in consultation with the district superintendent and S/PPRC; (2) for deacons, with an appropriate supervisory body; (3) for district superintendents, with the district

committee on superintendency; (4) for conference staff, with the appropriate supervisory body; (5) for others in extension ministries, with the appropriate persons in their agency.

E. Clergy shall be asked by the district superintendent in the charge conference to report on their programs of continuing education, formation, and spiritual growth for the past year and plans for the year to come. The district superintendent shall also ask the local church to describe its provision for time and financial support of continuing education for ministry, professional development, formation and spiritual growth for the pastors, diaconal ministers and deacons serving their primary appointment in that local church.

Chapter III III. CONTINUING EDUCATION AND SPIRITUAL FORMATION REQUIREMENTS

- A. 1. Every clergyperson who is serving under appointment shall annually complete four (4) Continuing Education Units (CEUs). Any clergyperson who is serving less than full-time shall complete a pro rata portion of CEUs each year.
2. Clergypersons are exempt from the above continuing education and spiritual formation requirements if they are Probationary Members of an Annual Conference who are active in the Board of Ordained Ministry's Mentoring Program, or are involved in academic study, such as: Course of Study; Advanced Course of Study; college or university degree programs; seminary degree programs; accredited clinical Pastoral Education programs; or Doctor of Ministry programs.
- B. Any or all of a clergyperson's program for completing the 4 CEUs required annually may be determined by the District Superintendent (in consultation with the clergyperson and his/her S/PPRC) in satisfaction of the recommendations and requirements which result from an annual "Evaluation of Clergy Effectiveness".
- C. As part of the 4 CEUs required annually, each clergyperson shall complete one (1) CEU per quadrennium in each of the following four (4) areas:
1. Theology/Ethics/Biblical Studies
 2. Practice of Ministry (preaching, pastoral care, administration)
 3. Leadership/Contemporary Church
 4. Prayer/Spirituality
- D. In addition to the above requirements, all active clergy are required to complete training mandated by the Annual Conference (i.e., Safe Sanctuaries, Domestic Violence, Racial Inclusiveness, etc.).
- E. In addition, all active clergy are encouraged to participate in a covenant accountability group with other clergy which meets at least once every month.

IV. DEFINITION OF A CEU

Each of the following, when duly reported, shall be the equivalent of one (1) CEU:

- A. Ten (10) contact hours of instructional and/or counseling sessions under qualified leadership that results in the receipt by the clergyperson of an official Certificate of Continuing Education, or where no Certificate is received, it has been pre-approved by the District Superintendent (travel and meal time will not be included as contact hours.)
- B. Study / Book / Lectionary Groups related to formation for ministry (not including Covenant Accountability Groups), for a maximum of one (1) CEU annually, when accompanied by the following information: name of group, approximate number in group, location, frequency of meeting, leader, hours person seeking CEUs has attended (minimum of 10 contact hours in group).
- C. Reading and reflection on three (3) books, when accompanied by an outline of study and a written reflection on each book with regard to how it impacts one's ministry, for a maximum of one (1) CEU annually.
- D. Ten (10) hours of listening to or viewing audio or videotapes / CDs / DVDs, either with a group of other clergypersons or individually, with a written reflection paper with regard to how it impacts one's ministry, for a maximum of one (1) CEU annually.
- E. Ten (10) contact hours (instructional session or its equivalent) under qualified leadership with distance learning (including online classes).

V. FUNDING FOR CONTINUING EDUCATION AND SPIRITUAL FORMATION

While some seminars and other programs of study can be expensive, this must be weighed against the absolutely critical task of maintaining faithfulness, effectiveness and fruitfulness in one's ministry. Continuing education funding through the Board of Ordained Ministry is available (up to \$1,200 per quadrennium) for every clergyperson. Clergy are also encouraged to view a portion of their accountable reimbursement amount as available for continuing education and spiritual formation. In addition, the S/PPRC must prioritize the designation of church funding for such purposes in consultation with its clergyperson(s) and the District Superintendent.

NURTURE

Recommendation:

1. Develop a three million dollar endowment for reducing graduate student indebtedness or for scholarship support for graduate education.
2. Implement Continuing Education requirements by designating Olmsted Manor as a center for Pastoral Continuing Formation.

Rationale:

Research/ Background Data

Possible considerations for Clergy Student Debt Issues:

Continue to link service to the Western PA Conference with and financial help provided through the conference. Issues to consider:

Note: it may be wise to set up a process that assists each student going into school with the intent of becoming a clergy person to work out a financial plan well before going into excessive debt. (The goal is to look at all possible options to avoid adding excessively to the debt level before even starting school). This is to avoid the situation where some may go through school funding all by loans and not working to make any effort to pay for the cost of school while others hold down job(s) and go to school at the same time.

1. Students shall be made aware of the availability of funds by all means possible prior to them graduating seminary.
2. Monies become available upon successful graduation (a 3.0 GPA or better) from an approved seminary and acceptance into the Western Pennsylvania Conference and with their appointment to serve a designated appointment. A formal application shall be completed initially upon graduation.
3. Debt reduction shall be in a form of matching funds – match 50% of approved school debt annually up to \$10,000 per year per qualifying Clergy person. (This amount can and should be adjusted as needed and as funding is available.) The individual clergy person is responsible for financing the other 50% by whatever means they are able to do so. Example: a person graduates from seminary with a total debt of \$50,000 (\$15,000 from undergraduate school and \$35,000 from seminary). They will be eligible to receive up to a total of \$25,000 over the next 3 years - \$10,000 year one, \$10,000 year two and \$5,000 year three. There is a maximum lifetime total grant allowance established by this program of \$50,000 – (this would be 50% of \$100,000 of debt).

4. These grants (each annual request for funds by the clergy person) shall also be dependent upon a successful evaluation and approval by the Church (SPRC and Superintendent or others if not appointed to a charge).

5. Failure to successfully complete the first 5 years of work as a clergy person after graduation will require the person to repay the grants provided on a prorated basis. Example: The clergy person leaves the conference to go to another conference of another denomination after receiving \$20,000 in grants over the first two years – they would be required to repay 60% (\$12,000) of the total grant (5 years is 100% paid off, 4 years is 80% paid off, 3 years is 60% paid off, 2 years is 40% paid off, and 1 year is 20% paid off.) Payment schedule would be created to allow for realistic repayments.

To fund this endeavor, an endowment would need to be established – approximately \$3,000,000 (This would be invested and hopefully earn approximately 8% per year or \$240,000 per year). This would make available approximately 24 \$10,000 grants per year. If there is more need than funding, then one may have to establish an annual application process and select only the number of individuals that funds are available for. OR one can reduce the annual allowance down but too much altering will make the help insufficient for those in greater need.

Submission by Don Henley

Please make copies for your use and for submitting to the District Office

CONTINUING FORMATION REPORT FORM

Name: _____

District: _____

(Please mark one of the following) ___ Elder in Full Connection; ___ Deacon; ___ Probationary Member; ___ Assoc. Member; ___ Local Pastor

Address: _____

Reporting Period: June 1, _____ - May 31, _____ Charge(s) served during the above reporting period: _____

Event Types (to be noted in Column 1 below)

- | | | | |
|-------------------------|---------------------------|--------------------------------|---------------------|
| 1. Workshop | 5. Spiritual growth event | 9. Mentor | 13. Other (specify) |
| 2. Internet Course | 6. Teleconference | 10. Video/Audio Cassette Study | |
| 3. College Course | 7. Seminary Course | 11. Course of Study | |
| 4. Certification Course | 8. Correspondence Course | 12. Travel | |

| EVENT TYPE | TOPIC | LOCATION | DATE | LEADER | NO. OF CONTACT HOURS <small>(10 = 1 C.E.U.)</small> | C.E.U.'S OR CREDITS |
|---|-------|----------|------|--------|--|---------------------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| TOTAL CONTACT HOURS / C.E.U.'s FROM ATTACHED SHEETS | | | | | | |
| TOTAL CONTACT HOURS / C.E.U.'s | | | | | | |

(Please list the same information as above on a separate sheet for additional Formation Events, as needed, and attach to this form, noting the total hours / C.E.U.'s on the next to last line above, before totaling hours in the last line above.)

Pastor: _____

Chairperson of S/PPRC: _____

District Superintendent: _____

Date: _____

(Please make four copies of this form: One copy to the Pastor, One copy for the S/PPRC Chairperson, Two copies to the District Superintendent (one copy being forwarded to the Order of Elders Coordinating Committee).)

CONTINUING FORMATION REPORT FORM *(continued)*

In the space below, please list reading from the past year that has been helpful to your ministry:

| Title | Author | Subject |
|--------------|---------------|----------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

What Continuing Formation Courses would you like to see offered within our Annual Conference?

Continuing Formation Action Plan

The United Methodist Book of Discipline clearly states the role of the Local Church in assisting the Pastor in the completion of her/his Continuing Formation Requirements:

Financial arrangements for continuing education as part of one’s professional development, formation, and spiritual growth shall be negotiated in the following manner: (a) for elders and local pastors it shall be done in consultation with the district superintendent and the committee on pastor-parish relations; (b) for deacons, with an appropriate supervisory body; (c) for district superintendents, with the district committee on superintendency; (d) for conference staff, with the appropriate supervisory body; (e) for others in extension ministries, with the appropriate person in their agency.
(Paragraph 351, 2004 United Methodist Book of Discipline)

1. After consultation between the Pastor and the S/PPRC, we have determined the following plan of Continuing Formation/Education for our Pastor in the upcoming year:

| Event Type | Topic | Location | Date |
|------------|-------|----------|------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

2. Below is the financial plan whereby we together will make the above plan come about:

| Event | Cost | Source of Funding |
|-------|------|-------------------|
| | | |
| | | |
| | | |
| | | |
| | | |

Church/Charge: _____

Signed:

_____, Chairperson S/PPRC Date: _____

_____, Pastor

Please send a copy of this form to the District Superintendent by May 31st. Extra pages may be used, if needed.