

# CLERGY EFFECTIVENESS

2016–2020



## IDENTIFYING AND SUSTAINING EFFECTIVE CLERGY LEADERSHIP IN THE NORTH TEXAS CONFERENCE



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# THE NORTH TEXAS CONFERENCE CLERGY

## EFFECTIVENESS INITIATIVE

The taskforce began its work in August 2013 at the direction of Bishop Michael McKee. The task force was composed of a diverse group of laity and clergy from the North Texas Conference, several members of the Board of Ordained Ministry, one District Superintendent and the Director of the Center for Leadership Development. The lay members brought valuable perspectives from a variety of professional fields.

The Initiative was charged with identifying characteristics of effective pastoral leadership, studying current evaluation tools and making recommendations for the future. The Initiative consulted numerous resources in carrying out its work, including past evaluative tools, GBHEM research on pastoral effectiveness, other annual conferences and secular resources.



# THE NORTH TEXAS CONFERENCE CLERGY

## INITIATIVE OBJECTIVE

Provide a summative tool in the context of a formative process.

The Initiative identified and focused on three areas of need:

1. **Staff/Pastor Parish Relations Training**—provide training, support and resources for local churches to partner with their pastors in reaching effectiveness
  - Utilize gifts of laity
  - Raise expectation for S/PPRC leadership
  - Offer more frequent S/PPRC training
  - Provide good quality on-line training
2. **Formative Process**—A process for clergy to continually “form” and grow in effectiveness.
  - Based on the Marks of Fruitfulness
  - Utilized by the S/PPRC and available to the Cabinet
  - S/PPRC helps pastor in formative process
  - S/PPRC meets with clergy at least quarterly using Marks of Fruitfulness
  - Set goals & objectives each year and celebrates successes
3. **Summative Tool**—A tool to “sum up” clergy effectiveness
  - The Year End Review Form (due December 15)
  - Identifies Areas of Strength
  - Identifies Areas of Growth leading to the formative process
  - Utilized by the Cabinet



# PASTORAL EFFECTIVENESS DEFINED

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

## LIVING DISCIPLESHIP FRUITFULNESS

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

## LEADING CONGREGATIONAL FRUITFULNESS

- Pastoral Care
- Preaching, Teaching, Sacraments, Worship Leadership
- Manages Self and Others
- Adaptive Leadership
- Connectional Leadership
- Relational Leadership
- Equipping Leadership
- Innovative Leadership

## DEVELOPING MISSIONAL FRUITFULNESS

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



# ROLE OF THE STAFF/PASTOR PARISH RELATIONS COMMITTEE

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

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

## RESOURCES PROVIDED

**BY THE CENTER FOR LEADERSHIP  
DEVELOPMENT [NTCLEADERSHIP.ORG](http://NTCLEADERSHIP.ORG)**

Staff/Pastor Parish Relations Committees will be provided training by the conference at organized gatherings and online throughout the year.

The S/PPRC is encouraged to utilize formative resources provided by the Center for Leadership Development in a three year cycle, focusing one year each on Living, Leading and Developing.



# THE MARKS OF FRUITFULNESS AS A LEADERSHIP DEVELOPMENT TOOL

## FOR S/PPRC COMMITTEES

The Marks of Fruitfulness tool puts before the pastor and S/PPRC conversation starters about fruitful ways a pastor

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

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

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

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

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

**October–December** Meeting—S/PPRC and Pastor complete the annual Marks of Fruitfulness Evaluation Tool independently and submit on or before the **deadline December 15**.

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



# ‘EFFECTIVENESS’

## DEFINITIONS AND CHARACTERISTICS

*Defined by the Marks of Fruitfulness*

### LIVING DISCIPLESHIP FRUITFULNESS

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

- **Spiritual Health**—attentive to continued spiritual growth; participates in an ongoing accountability group; observes Sabbath
- **Emotional/Mental Health**—experiences a high level of life satisfaction and optimism; is self-aware and maintains a sense of well-being in times of conflict; handles feedback constructively
- **Professional Health**—seeks opportunities for learning, growing and developing as a disciple and pastor
- **Fiscal Health**—is a faithful steward of personal resources; tithes; maintains manageable debt levels; is prepared for the future (will, retirement, insurance, savings, health care, housing, etc.)
- **Physical Health**—balances nutrition, exercise, work and play; is aware and addresses health needs; observes day off and vacation
- **Relational Health**—has a supportive network of family and friends; maintains appropriate connections and boundaries both personally and professionally



# ‘EFFECTIVENESS’

## DEFINITIONS AND CHARACTERISTICS

### LEADING CONGREGATIONAL FRUITFULNESS

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

- **Pastoral Care**—attentive and timely in visitation of those hospitalized, homebound, or in need of counsel; offers compassionate and empathetic counsel; maintains appropriate boundaries and honors confidentiality
- **Preaching, Teaching, Sacraments, Worship Leadership**—crafts and presents organized, relevant and Biblically sound sermons; teaches the Word; understands, articulates and administers the Sacraments; leads worship with joy
- **Manages Self and Others**—Manages time and schedules, roles and responsibilities, sets and achieves realistic and measureable goals for self, staff and others; utilizes resources efficiently
- **Adaptive Leadership**—recognizes when change is appropriate, adapts to change and leads others effectively through change; learns from failure and helps others do the same; asks questions; works collaboratively to solve problems; understands and accepts ambiguities to reach sound decisions
- **Connectional Leadership**—supports and promotes the mission of the United Methodist Church; affirms the unique Wesleyan way of itinerancy, apportionments, supervision, etc.; seeks opportunities to serve within the District and Conference; connects the local church within the larger mission of the UMC
- **Relational Leadership**—inspires others to a common purpose and vision; collaborative, inclusive and empowering in decision-making, models Christian values in making decisions; listens, informs and inspires effectively through multiple communication vehicles (i.e. spoken, written, social media, etc.)
- **Equipping Leadership**—empowers and equips others through coaching, teaching, delegating, and collaborating to offer their gifts and grace willingly in joyful obedience to Christ and the Church
- **Innovative Leadership**—exhibits a creative and entrepreneurial spirit in managing and leading the congregation to strive for fruitfulness





# ‘EFFECTIVENESS’

## DEFINITIONS AND CHARACTERISTICS

### DEVELOPING MISSIONAL FRUITFULNESS

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

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



# THE ROLE OF THE DISTRICT SUPERINTENDENT

Evaluation is a continuous process of formation that must take place in a spirit of understanding and acceptance, as outlined in *The Book of Discipline* ¶350. Utilizing the Year End Review Form and the Marks of Fruitfulness as a summative tool, the district superintendent will annually evaluate the pastors' effectiveness. The Cabinet prayerfully considers a pastor's strengths and areas of growth, striving to match the pastor's gifts with the needs of the local church and mission field.

## RECOGNIZING INEFFECTIVENESS

Recognizing the need for ongoing professional development and skill building, clergy are encouraged to increase their effectiveness through continuing education, utilizing resources provided by the Center for Leadership Development and a myriad of other sources.

Ineffective clergy may exhibit one or more of the following characteristics and an inability to grow or improve:

- A loss of a sense of call
- Incapacity for dynamic preaching and other communication
- Incapacity to reach people for Christ
- Incapacity or unwillingness to teach and live the Wesleyan Way
- Does not demonstrate leadership qualities
- Inability to learn how to deal with conflict
- Unwillingness to work hard
- Lacks desire to be connectional and itinerate
- Incapacity for self-evaluation and growth/learning
- Poor relationship-building skills
- A service record characterized by frequent moves, for example, consecutive appointments lasting one or two years
- Poor evaluations from the local church Staff/Pastor Parish Relations Committee
- Poor reports and feedback by the district superintendent
- A pattern of unsuccessful ministry in local churches before and after "effective" pastors

## Policy Statement

The following procedure will address ineffectiveness:

Clergy deemed ineffective will begin a process of intervention and support as outlined in *The Book of Discipline* ¶334.3. Areas of needed improvement will be identified and a plan for improving ministry effectiveness will be devised in collaboration with the District Superintendent or other Cabinet member as directed by the Bishop. The clergy under review will receive and acknowledge the policy on *Identifying and Sustaining Effective Clergy Leadership*. He or she will be advised that failure to make improvement in areas of concern may lead to administrative action. Consultations and reviews will be scheduled with the clergy at appropriate intervals. All reviews and progress will be detailed and placed in the clergy's file. Rather than complete a plan for improvement, the clergy may voluntarily consider leave options as provided for in *The Book of Discipline* ¶354. If substantial progress on the improvement plan is not made, the Cabinet will initiate appropriate action in keeping with *The Book of Discipline* ¶360.



CLERGY  
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**THE UNITED METHODIST  
CHURCH OF NORTH TEXAS**

*Reaching out to  
the Heart of North Texas*

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