



Mutual Ministry Reviews and Leadership Meetings

Introduction

Clergy Covenants in the Diocese of Michigan regularly provide that:

Mutual Ministry Review (MMR). The Clergy-in-Charge, Wardens and Governing Board (and, if possible with other key ministry leaders) agree, at least annually to review and discuss the mutual ministry of the Congregation, including:

- i. Assessing how well leaders are carrying out their responsibilities to each other and to the ministry they share.
- ii. Establishing goals for strengthening the work of the Congregation.
- iii. Identifying any areas of confusion, conflict or disappointment which may need attention and may be adversely affecting mutual ministry.
- iv. Clarifying the expectations of all parties.

A mutually agreed upon third party (such as a member of the Bishop's staff or an approved consultant) may be engaged to facilitate the MMR process.

Annual Leadership Meeting. Once a year, the Wardens and up to two others designated by the Governing Board will meet with the Clergy-in-Charge to provide feedback to the Clergy-in-Charge regarding: progress toward previously defined goals; the Clergy-in-Charge's personal gifts, skills and effectiveness in responding to the demands of particular ministries; any concerns or constructive feedback the Wardens or Governing Board may have regarding the Clergy-in-Charge's performance of duties; and identification of priorities for future goals and professional development.

Mutual Ministry Reviews and Leadership Meetings are two separate, but related, processes. The mutual ministry review is designed to occur annually. The purpose of the mutual ministry review is to consider how the congregation is doing. It is a time to celebrate what has been done well and to understand what might be done better. The focus is on the common ministry engaged in by the whole congregation, including the partnership between clergy and laity. It is generally conducted by the Vestry and Clergy in Charge but may include other ministry area leaders or surveys of the congregation or representative constituencies.

The mutual ministry review should be facilitated by a congregational consultant from outside the congregation. Different facilitators prefer different processes such as: (i) the process created by the Diocese of Los Angeles and now a national church resource: <http://www.episcopalfoundation.org/resource/Resource%20Library/Living%20Into%20Our%20Ministries/Living%20into%20Our%20Ministries.pdf>; (ii) an organic mutual ministry review process available from the diocesan office or at pages 307-316 of Jim Gettel, *Where Jesus Leads: Helping Christian Communities to Follow* (Deep River Books, March 2017); or (iii) an Appreciative Inquiry process.

A Leadership Meeting is a periodic review of an individual's performance in an assigned position, measured against defined job duties. The aim of a leadership meeting is to clarify responsibilities and expectations. The leadership meeting evaluates progress based on established criteria and suggests ways that leaders can work more effectively together. The aim is to develop the unique ministry of the priest and to provide the opportunity to identify development opportunities for skills enhancement and spiritual deepening.

The mutual ministry review focuses on the way everyone works together as a team to achieve the goals of the congregation and to fulfill the mission of church. The leadership meeting review focuses on the individual gifts and skills that the Clergy-in-Charge brings to the congregation. The mutual ministry review helps the Governing Board and the priest understand what each must do, working together. It should not focus on what the priest alone does or should do, but what everyone is accomplishing as a cooperative unit.

Both types of review should be built on a foundation of trust and conducted in an atmosphere of constructive input. Ideally, an outcome of the mutual ministry review is an agreed plan for the future that includes some specific goals. These goals provide the framework for the individual goals that are assigned to both the Governing Board and the Clergy-in-Charge. Each understands what their role is for the attainment of the shared objectives. At the end of a mutual ministry review it should be possible for the priest and Governing Board to determine where effort needs to be spent, what the roles and responsibilities of the parties (clergy, Governing Board and congregation) are, and what the priorities are for the next review period.

Mutual ministry review → Parish goals

Parish Goals → Governing Board goals and clergy goals

Characteristics of a positive performance review:

- Conducted in a supportive climate to help clergy deal with the personal dimensions that may arise in discussion of elements that are integral to their work.
- Based upon objective criteria and pre-established goals.
- Provides opportunity for give and take in discussion.
- Results in clear, measurable expectations and action plan.
- Provides opportunity for individual development and ministry skills enhancement through use of resources such as the continuing education budget or agreed upon time for study.

Reasons to conduct a leadership meeting:

- A time to recognize and celebrate what is going well.
- Identifies what may need to be changed in a constructive manner.

- Provides clear and reliable feedback.
- Strengthens relationships by sharing information.
- Minimizes/eliminates unrealistic expectations.
- Renews personal goals.

Steps to be taken:

- Develop a process that fits the style and composition of the congregation.
- Involve the priest from the beginning.
- Form a team to conduct the leadership meeting.
- Collect relevant information - current, typical, specific and attributable.
- Encourage the priest to engage in self-evaluation and discernment of ministry.
- Share findings and arrive at conclusions.
- Agree upon specific measurable objectives for the next review period.
- Evaluate clergy compensation to determine if a salary increase is warranted. The performance review is one element in determining the appropriate increase percentage. Other factors to be considered include cost of living adjustments, the relationship of current compensation to the average compensation provided within this Diocese and surrounding dioceses, scope of position and length of service. The Church Pension Fund publishes an annual report with compensation information in each diocese (www.cpg.org/research).
- Summarize conclusions for the Governing Board.
- Engage Governing Board support in the action plan as appropriate.

Leadership Meeting Approaches

A Leadership Meeting is not a performance evaluation. The Clergy-in-Charge and Governing Board are partners in ministry in a covenant relationship. The Clergy-in-Charge has unique roles, responsibilities and authority in the congregation and does not “report” to the Governing Board; the Governing Board is not the “boss” of the Clergy-in-Charge. Accordingly, we have eliminated typical “performance evaluation” language and instead mandated feedback and a discussion about priorities and development.

The leadership meeting and the forms used to record the process should be chosen to fit the style of the congregation. Each congregation should select the approach that suits them best and that provides a sustainable method so that the annual leadership meeting becomes easy to administer. Ideally, the process should not be burdensome to complete and the approach should be agreeable to all parties concerned. Organization and content may be based on performance review materials from other dioceses (subject to the previous paragraph). The following models vary from the simplest format to a more complex, comprehensive format:

1. The Diocese of Florida’s process covers both mutual ministry and performance reviews including the philosophy behind reviews. The document may be found at <http://www.diocesefl.org/index.php?mod=mutMinReview>.

2. The Diocese of Texas' clergy review form may be found at www.epicenter.org, under Diocese/Forms, or at http://aa86e41e7d951355383b-cb342165bfeaa4f2927aec8e5d7de41f.r23.cf2.rackcdn.com/uploaded/c/0e473599_clergy-performance-review.pdf.
3. The following most basic Clergy-in-Charge Leadership Meeting form.

Clergy-in-Charge Leadership Meeting

The purpose of this form is to gather information and give constructive feedback to the Clergy-in-Charge about his/her work during the past year, focusing on eight aspects of the Clergy-in-Charge's role. In answering these questions, give specific examples whenever possible and also note any special accomplishments that may not fall into any of the categories listed.

1. Liturgy and Preaching

What areas are going well and are successful?

What needs attention and improvement?

2. Stewardship

What areas are going well?

What areas need attention?

3. Pastor & Spiritual Guide

What areas are going well?

What needs attention?

4. Administrator

What areas are going well?

What needs attention?

5. Motivator of staff and laity

What areas are going well?

What needs attention?

6. Mission and Vision

What areas are going well?

What needs attention?

7. Christian Formation

What areas are going well?

What needs attention?

8. Evangelism

What areas are going well?

What needs attention?

9. Other Notable Achievements

Clergy-in-Charge Leadership Meeting Summary

Areas of strength:

Relate to key areas in job description e.g. preaching, pastoral care, stewardship, administration. Use examples.

Areas to be strengthened:

Relate to key areas in job description e.g. preaching, pastoral care, stewardship, administration. Use examples. Constructive comments only.

Goals for forthcoming year:

List two or three areas with specific suggestions.

Ideas to consider:

For Governing Board: List three or four practical suggestions about areas of improvement for the Clergy-in-Charge.

For Clergy-in-Charge: List three or four practical suggestions where the Governing Board could better assist the clergy.