



# Readiness to Effectiveness

**Preparation for Professional Ministry in  
The United Methodist Church**

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**Tool Kit for Annual  
Conference Leaders**

for Equipping  
Commissioned Ministers and Local Pastors  
as Servant Leaders



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The United Methodist Church**

**General Board of  
Higher Education and Ministry**

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**Division of Ordained Ministry**

**The United Methodist Church**

**2006 Edition**

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Produced by the Office of Interpretation.

Manufactured in the United States of America.

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# A Word of Welcome

Greetings from the Ministry Preparation Resource Team! We are a team composed of deacons and elders. We offer help in the preparation of clergy entering professional ministry in The United Methodist Church:

- local pastors completing the Course of Study
- commissioned ministers
- clergy transferring from other denominations.

The Ministry Preparation Resource Team believes a positive experience of entry into professional ministry provides a foundation that leads to effectiveness in servant ministry. Supported by collegial relationships, encouraged in skill development, and challenged to reflect theologically on the practice of ministry, participants will integrate their Christian faith and commitment with the church's mission.

This *Tool Kit* is for annual conference leaders in charge of the professional ministry preparation process. It is a resource to help create and sustain annual conference systems relating to local pastors in the Course of Study and to probationary/commissioned members moving toward deacon's and elder's orders and full membership and to those entering The United Methodist Church from other denominations seeking recognition of orders.

The *Tool Kit* has been developed in relation to *Clergy Mentoring: A Manual for Commissioned Ministers, Local Pastors and Clergy Mentors*. The *Tool Kit* is a guide for annual conferences to develop the Ministry Preparation Program. The *Clergy Mentoring Manual* is a resource for clergy mentors and those being mentored.

This *Tool Kit* does not address the candidacy process, which precedes commissioning and the licensing of local pastors. Resources for the candidacy process are provided by the General Board of Higher Education and Ministry (GBHEM), particularly in the book, *The Ministry Inquiry Process*, available through Cokesbury.

We cannot overemphasize the importance of paying attention to the professional ministry preparation process in your annual conference. Done well, the process will provide invaluable relationships for those in the appointive ministry as they develop their vocational identity, reflect theologically on the practice of ministry, and review the exercise of authority and power in their clergy roles.

## Use the Resource Team

We invite you to make use of our Ministry Preparation Resource Team, sponsored by the Division of Ordained Ministry of the General Board of Higher Education and Ministry. Initial contact with Anita D. Wood will begin the process. If it is agreed the team will help with training, two team members will meet with appropriate leaders in your conference to reflect on your process for professional ministry preparation. The team can help you prepare and lead training events. The team is available on a first-come, first-served basis, usually with a lead time of six to eight months. Transportation for Resource Team members is paid by the Division of Ordained Ministry, while the annual conference is responsible for expenses related to food and lodging. There is no honorarium.

### **The Ministry Preparation Resource Team: 2005–2008**

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# Phases of the Journey Into Appointed Ministry

The graphic below illustrates that the professional ministry preparation process of an annual conference focuses on new clergy—commissioned ministers and local pastors in the Course of Study.

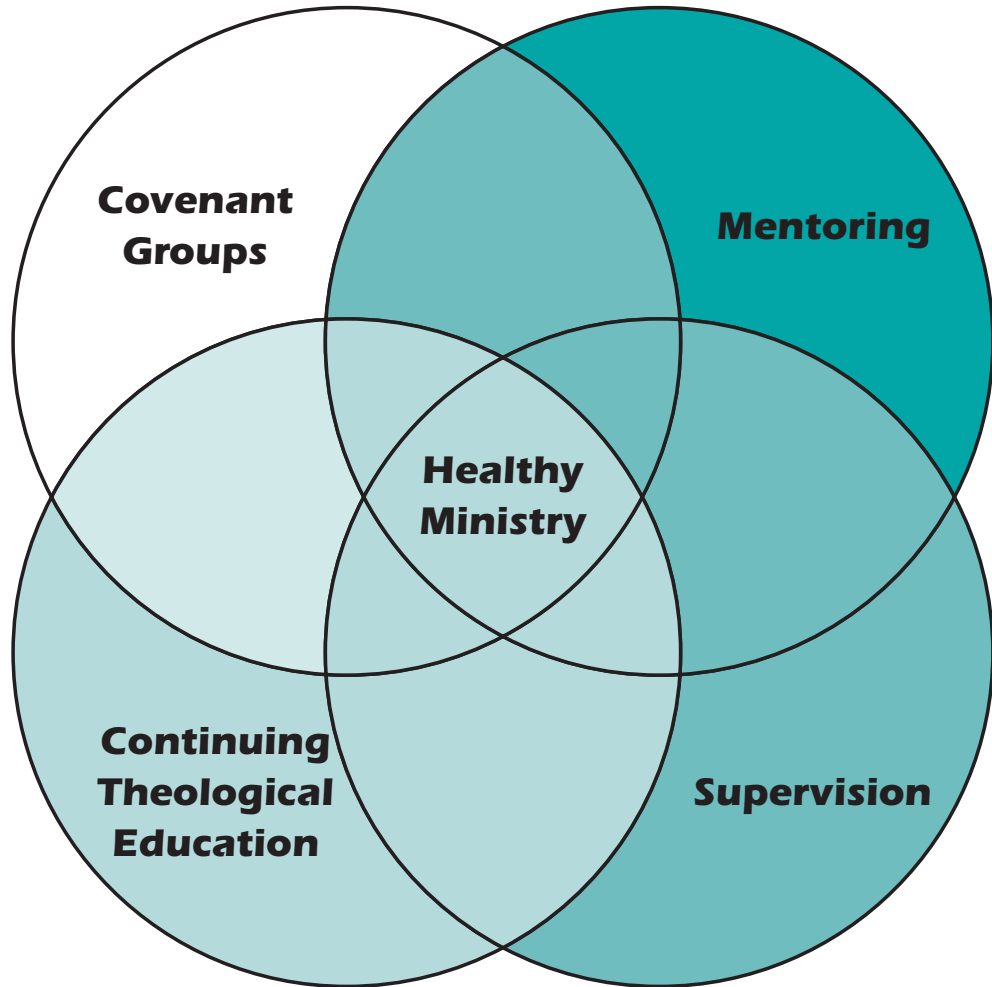
	Lay Ministry	Candidates	Local Pastors in Course of Study	Commissioned Ministers in Probation	Full-Member Clergy, Long-Term Local Pastors & Associate Members
Discernment of Spiritual Gifts, Resources	Spiritual gifts inventory: Disciple Bible Study	Local Church: pastor: discipleship training	District committees on ordained ministry	Board of Ordained Ministry	Order of Deacons: Order of Elders: Fellowship of Local Pastors
Professional Training	Accredited courses: professional programs	College and seminary studies: specialized studies	Course of Study: Licensing	Continuing theological education & skills training	Doctor of Ministry & other extended experience
Supervision & Counseling	Pastor: Christian counselor: other	Clinical pastoral education: dist. council on ministries: district superintendent	District superintendent & district committee on ordained ministry	District superintendent & Board of Ordained Ministry: other	Conference pastoral counseling: district superintendent: other
Mentoring	Trusted friends: Stephen minister: other	Candidacy mentor from "Exploring" completion: Guidebook	Clergy mentor throughout Course of Study years	Clergy mentor during first years of appointment	Mentoring with peers
Reflective Disciplines	Devotional life: retreats: other	Field education: small group & personal devotions	Personal spiritual disciplines & peer groups	Theological reflection in covenant peer groups	Personal spiritual disciplines and covenant groups

Readiness to Effectiveness



## Healthy Ministry

The graphic below shows that healthy ministry is the result of a combination of support systems. The professional ministry preparation process for new clergy integrates four components. As the board of ordained ministry considers its responsibility for clergy entering full membership of the annual conference, this combination of support systems must be included.



What catches your eye in the above image? In this image, we intentionally separated the elements of healthy ministry in order to highlight each element. At the same time, together the elements form one image, depicting how a healthy ministry happens. This is true not only for people in the preparation process, but also for clergy in full membership.

Commissioned ministers are simultaneously engaged in covenant groups, mentoring, continuing theological education, and supervision. While in the Course of Study, local pastors are also involved in mentoring and supervision. Each annual conference decides how to address each of these elements and how to integrate them into a comprehensive process, always with the goal of facilitating healthy ministry practices or effectiveness in ministry. Success in reaching the goal has to do more with how well the preparation processes are planned and implemented by the board of ordained ministry than with how well a candidate for ordination measures up on some scale of ministerial skills in the profession.

# Support Systems for United Methodist Clergy

## Denominational Systems

Bishop and superintendents  
Board of Ordained Ministry  
District Committee on Ordained Ministry  
Ministerial Education Funds  
Pension and benefits  
Constitution and *Book of Discipline*  
Pastor/Staff-Parish Relations Committee  
Candidacy Mentor  
Clergy Mentor  
Conference-initiated programs

## Characteristics of healthy denominational systems

Communication is two-way.  
Operating principles are publicly defined.  
Accountability systems and feedback procedures are established and routinely used.  
The systems and procedures are regularly reviewed and revised.

## Personal Systems

Spiritual and physical disciplines  
Family and friends  
Continuing education programs  
Peer groups  
Counselors and consultants  
Self-chosen mentor for personal/professional growth

## Characteristics of healthy personal systems

Roles and responsibility are affirmed.  
Personal and vocational identity is clear.  
Feedback systems are maintained and enhanced.  
Personal/professional growth is celebrated.

This graphic invites clarification of denominational and personal support systems for clergy. The interplay of these two systems becomes important as the board of ordained ministry carries out its responsibility for clergy support systems.

Church bodies initiate the denominational systems of support with the purpose of enhancing and extending the ministries of clergy. Clergy initiate personal support systems with the purpose of nurturing their own personal and professional health.

The denominational and personal systems are dynamic and interrelated. Every clergy member of an annual conference is both an agent and a recipient of the denominational systems. All clergy have personal support systems to one degree or another. Clergy who have healthy personal systems can represent and receive denominational support systems more openly. Clergy without adequate personal support systems may experience support efforts at the denominational level as repressive and punitive. These clergy, generally, do not represent the denominational systems in positive ways.

Tension exists between support systems controlled by the conference and those managed by individual clergy. This tension creates vibrancy in the structure of the annual conference.

The graphic lists four characteristics of healthy support systems for both denominational and personal support systems. Denominational support systems may be repressive and/or

punitive if they don't display the following four characteristics: (1) communication is two-way; (2) operating principles are publicly defined; (3) accountability systems and feedback procedures are established and routinely used; and (4) these systems and procedures are regularly reviewed and revised.

Personal support systems will not offer meaningful support for clergy if these systems do not have the following characteristics: (1) roles and responsibilities are affirmed; (2) vocational and personal identity is clear; (3) feedback systems are maintained and enhanced; and (4) personal/professional growth is celebrated. Clergy burnout, misconduct, and ineffectiveness often indicate poor personal support systems.

While clergy are responsible for establishing and nurturing their personal support systems, annual conference leaders can model, support, and stimulate the use of such systems. We encourage church leaders to review their personal support systems and to add components that are lacking. Such modeling by leaders becomes the single most important factor in the growth of personal support systems for clergy. Modeling also helps guard against any tendency on the part of leaders to project onto others difficulties unexamined in their own ministries.

# The Heart of the Matter—Renewing the Covenant of Ministry

As the story of the United Methodist tradition is told, 1996 will stand as a watershed year for the renewal of the covenant of ministry in the denomination. The distinctive orders of deacon and elder were established and a particular focus was placed on the importance and structure of the probationary process with the introduction of clergy mentoring. Other components were to be developed and coordinated as a fourfold approach to shepherd a commissioned minister through the probationary years: clergy mentoring, covenant groups, continuing education, and supervision.

Anticipating the changes made by the 1996 General Conference, the General Board of Higher Education and Ministry established a team that would work with the legislative changes. The team was to attempt to conceptualize and envision practical strategies and training protocols for annual conferences. The Ministry Preparation Resource Team has provided quadrennial training events for representatives of boards of ordained ministry, sent resource teams to train mentors, boards of ordained ministry, and cabinets in annual conferences throughout the connection. During this process, the reality of the reform and renewal of ministry has become increasingly clear.

Members of the team have likened it to the reformation and renewal of covenant of the people of Israel during the reign of Josiah. The reforms envisioned re-establishing leadership in the model of David, a cherished memory for the people. Josiah was intent on focusing the treasure of the people in renewing the Temple worship of the people. The High Priest, Hilkiah, found a copy of the *Book of the Law*, the foundational covenant between God and God's people, in a box of rubbish to be removed from the Temple during reconstruction. Some scholars believe the content of the scroll was the earliest form of Deuteronomy. Reading and remembering the covenant law brought Josiah to the conclusion that doom was in store for Israel. However, Huldah the prophetess interpreted the covenant as sparing them from doom because of their faithful acts and renewed commitment to the covenant with God.

The worship, priestly practices, liturgical practices of the people and the teaching of the covenant were renewed and laid down in the Deuteronomic revision. It is placed in the Torah as the Hebrews are poised on the plains of Moab ready to enter the Promised Land. To this day, the central affirmation of the Deuteronomic renewal, the *Shema* (Deut. 6:4-9), focuses the covenant of the Jewish people with God.

Centuries later Jesus used the *Shema* to summarize two main principles of the commandments, placing himself solidly in his faith tradition:

*Hear, O Israel: The Lord, our God, the Lord is one; you shall love the Lord your God with all your heart, and with all your soul, and with all your mind, and with all your strength.*  
(Mark 12:29-30)

In these familiar words, Jesus reconfirmed that living within the covenant community means being called to love God with all one's being, every aspect of personhood. This is an especially important message for Christians living in a culture which encourages compartmentalization that is leading to epidemic dissociation.

Dissociation means creating false barriers between aspects of life: emotional, intellectual, structural, ethical, even doctrinal. Those false barriers enable us to rationalize the acceptability of actions inconsistent with who we claim to be. On the contrary, the *Shema* is a principle of total engagement with God, declaring that the fullness of faith is found by seeking to give ourselves (*agapé* love) to God with complete integrity. In doing so, we fully discover God's self-giving love for us along with a way of life in supportive, caring community with our neighbors. The covenant is relational and holistic in its nature.

The Ministry Preparation Resource Team understands the 1996 General Conference action, the vision of the bishops, and the hopes of United Methodists for renewal as an opportunity for reform of the church akin to that of Josiah for the covenant people of Israel. As with Josiah, the renewed covenant flows from repentant leadership eager to be responsive to the living God, to redemptive seers, ministerial leadership, community, our hearts, our minds, our heads, our homes, and our children to fulfill the purposes of God. The team has also found the form of the *Shema*, as Jesus teaches it, a helpful frame for understanding the interlocking pieces of the ministry preparation process (mentoring, covenant groups, continuing education, and supervision). Further, the *Shema* and the instructions given for perpetuating the faith are inherent in the five touchstones (call, covenant, context, credo, connexion that form the mentoring process.\*

Jesus is the formative model for covenant ministry. The call of the disciples is the genesis of our understanding of renewal. Jesus was the formative mentor and rabbi for the apostles. Yet, we remember when he sent them out, they were sent out two-by-two, companions and mentors on the journey to call and disciple the people of God. This model of mentoring was perpetuated in the early church. Early Methodist circuit riders went with the supervision of the bishop and the connection of ministry to mentor and empower them. These were evangelists of the grace and love of God. The sermons of John Wesley are overflowing with Jesus' revision of the *Shema* and other discourses on the covenant of love between God and God's people in Christ Jesus. Charles Wesley's hymns poetically accompany this, most perfectly phrased in *Love Divine, All Loves Excelling*.

\*From *Mentoring Into Vocation* by Mark Fowler. Published by the General Board of Higher Education and Ministry of The United Methodist Church, copyright © 2006.

The following graphic displays the interlocking nature of the concepts of the *Shema*, the Wesleyan Quadrilateral, the Ministry Preparation Process (MPP), and covenantal commitments. Although the various segments of the ministry preparation process address the whole person, the focus of each segment may help to distinguish the emphasis of each piece of the program.

<b>Jesus Shema</b>	<b>Aspect of Persona</b>	<b>Developed within the Covenant</b> (this and the next column are derived from early Christian duality)	<b>Outside of Covenant</b>	<b>Companion Discipline of the Ministry Preparation process</b>	<b>Doctrinal Standard of the Wesleyan Quadrilateral</b>
Heart	Passion	Love (agapé) Compassion	Self-indulgence Pride	Mentoring	Scripture
Mind	Intellect	Wisdom	Arrogance	Continuing Theological Education	Reason
Soul	Spirit	Enthusiasm	Fanaticism	Covenant Disciple Groups	Experience
Strength	Body	Community	Materialism	Supervision	Tradition

The directive of the rabbis for praying the *Shema* may be instructive to the establishment of the ministry preparation process in annual conferences. While saying the opening phrase, the heart of the covenant, **Hear, O Israel, the Lord our God, the Lord is One!**, each person is to cover their eyes with their hands. This is intended to remind the person praying that this formative expression of the covenant deserves undivided attention. Just so, the covenant of ministry at the heart of this process deserves the undivided attention of the commissioned minister, the mentors and partners in the process, the boards of ministry, and the cabinets and churches. The process was born in hope for renewal and transformation. The prayer of the Ministry Preparation Resource Team is that it will focus us all on the covenant and not distract us in the process.

# Chapter 1: The Professional Ministry Preparation Process—An Overview

## Mentoring, Continuing Theological Study, Covenant Groups, and Supervision

In preparing and assessing the Ministry Preparation Process in each annual conference, the board of ordained ministry is charged with developing four aspects with a view toward agreed upon measures of effectiveness toward ordination. Each aspect should provide opportunities to adequately resource and evaluate the commissioned minister in light of the measures of effectiveness specifically articulated and shared by the board. The methods of both formal and informal assessment, evaluation and judgment utilized by the board and its agencies should be familiar to all parties of the ministry preparation process.

Each conference board should articulate the expectations of the four aspects of the process for itself, the commissioned ministers, partners in the formal preparation process and the conference community. Support should be provided through the covenant community of clergy to realize these expectations.

The period for commissioning to ordination is focused on *vocational development* in the journey from *readiness to effectiveness*. It is assumed that the time of candidacy and the affirmation of commissioning have focused on *fitness* and *readiness* for ministry through intensive mentoring and counsel in *discernment* and *calling*. Although these important aspects of spiritual and vocational formation are not finished, the focus of the Ministry Preparation Process shifts to development toward effectiveness in ministry. The elements of the program have been assembled with this purpose in mind.

## Part 1: Probationary Process for Commissioned Ministers

The United Methodist Church requires a probationary period of three to eight years. This process may begin when half the education requirements have been met, but must include “at least three full annual conference years following the completion of the educational requirements. . . .” (§335.1, *2004 Book of Discipline*)

During annual conference, the bishop commissions candidates recommended by the board of ordained ministry and approved by the clergy session. This begins the probationary period and brings the commissioned person into the clergy covenant. These commissioned ministers will serve under appointment by the bishop during the probationary years in areas appropriate to their calling.

The probationary process addresses the clergy’s need for continuing integration of formal studies, life experiences, and the evolving challenges of leadership in a church that is at once local and global. Clergy leadership must be characterized by deep and growing Christian faith, a commitment to carry out the church’s mission of making disciples of Jesus Christ and, therefore, claim their discipleship and a willingness to equip laity for ministry. This leadership is fostered by continuing, disciplined study of scripture, theology, history, and the changing multicultural society.

The probationary period is part of a continuum in the training/formation of clergy that begins with candidacy and theological education and culminates with covenant groups, mentoring, theological education, and supervision during probation. For those candidates not graduating from a United Methodist seminary, this probationary process will provide a working introduction to the United Methodist ethos and resources of the denomination.

Because ordination is not the private domain of a single annual conference (ordained clergy may serve across the entire connection), the General Conference establishes minimum standards and requirements for the probationary period. The General Board of Higher Education and



Ministry provides guidance to all annual conferences. Within the parameters of these guidelines, each annual conference through its offices of bishop, cabinet, and board of ordained ministry will develop a plan particularly suited to its situation, and supervise implementation of this plan.

## Principles for Probationary Processes

### Mission

*A person's ministry during the probationary period establishes lifelong patterns. Thus the probationary period is a time when excellence in ministry is modeled by clergy mentors, teachers, and supervisors, as well as nurtured in the probationer. The expectation is that patterns of excellence fostered through (1) clergy mentors, (2) continuing theological education, (3) covenant groups, and (4) supervision will yield effectiveness in ministry (See ¶326, 2004 Book of Discipline). The following principles facilitate this process:*

### Expectations

1. Commissioned ministers are clergy and serve with, and on behalf of all clergy and laity of the conference. They will be supported, assisted, and strengthened for ministry where they are serving.
2. Probation involves assessment of the commissioned minister in relation to the church and the church in relation to the commissioned minister. This transitional period is a time of mutual evaluation of call and commitment within our connectional system of ministry. The integrity of probation is strengthened not only when a call is confirmed and leads to ordination, but also when people are appropriately redirected to other Christian expressions of vocational calling.
3. The process reflects and establishes a sense of our Wesleyan tradition.
4. The processes affirm varying gifts and settings for pastoral and specialized ministries, as well as the ministry of the laity. The involvement of laity in Christ's ministry is affirmed in the probationary process.

### Implementation

1. The annual conference board of ordained ministry uses resources provided by the General Board of Higher Education and Ministry, the United Methodist seminaries (and, where appropriate, colleges), and other annual conferences to develop a probationary plan and a means of evaluating the plan.
2. Annual conference leadership (bishop, board of ordained ministry, and cabinet) and probationary members have mutual responsibility for implementing the probationary plan.
3. The fruitful and effective ministry practices expected of probationary members is the same as the disciplines expected of full-member clergy.
4. Among these practices are spiritual disciplines, theological reflection, human relations skills, understanding of systems theory, self-definition, mutuality across gender and cultural lines, and continuing formation of pastoral and service ministry skills.
5. Trust and community developed during the probationary period are preparatory for membership in the Order of Elders or Order of Deacons.

## Guidance for Mentoring

### Mission

*This mission of mentoring is to promote vocational identity and effective ministry through a relationship that provides support, accountability, and growth in Christian maturity.*

### Expectations

1. The board of ordained ministry selects, trains, and assigns clergy in full connection as clergy mentors for commissioned ministers. Probationary members are expected to participate in the training sessions with their mentors.



2. The clergy mentor relationships have a covenantal nature. The mentor and probationary member share in spiritual disciplines, in mutual recognition of the presence and leading of God, and in spiritual discernment concerning the probationer's call, authority, and function, through theological reflection on ministry in their current appointment.
3. The board, clergy mentor, and probationary member seek mutual trust and respect. The board provides a clear definition of confidentiality within the mentoring relationship.
4. The board receives an annual, non-evaluative report from the probationary member and mentor describing their mentoring process.
5. Both probationary members and clergy mentors receive an annual letter or memo from the board regarding timelines for reporting and to whom the report is to be sent.
6. The mentor and probationary member identify the various issues related to vocational identity to be explored in the mentoring relationship.
7. Clergy mentoring will take place in one-on-one relationships, except in cases where the board of ordained ministry determines that group mentoring is a more effective model.

## Guidance for Continuing Theological Education

### Mission

*An emphasis on learning has been characteristic of the Methodist movement from its beginning and continues to be vital for effective ministry. The years of probationary membership as a commissioned minister are intended to foster habits, attitudes, and practices of theological study that will influence one's entire ministry.*

### Expectations

1. The board of ordained ministry ensures that opportunities are provided by the local church or employer for commissioned ministers to integrate disciplines for Christian identity and ministry. The disciplines include theological, historical, and biblical studies within the context of ministerial practices.
2. The board of ordained ministry provides for disciplined reflection on Christian identity and ministry through study that includes:
  - study groups led by ordained elders and/or deacons
  - study groups or disciplined study led by peers
  - congregational study led by the commissioned minister
  - self-directed study.
3. The board of ordained ministry develops an evaluative process through which the probationer identifies special needs for further studies in particular areas involving leadership skills, reflection on ministerial settings, spiritual development, and disciplined habits of responsible study of scripture, theology, and history.
4. The board of ordained ministry may partner with United Methodist seminaries to provide resources for continuing theological education. This may include events held on the seminary campus, at a conference location, or through electronic media.

## Guidance for Covenant Groups

### Mission

*In covenant groups, commissioned ministers receive encouragement for the practice and work of ministry as servant leaders. They reflect on the grounding of ordained ministry, and consider covenant ministry in the life of the annual conference. (See ¶326, 2004 Book of Discipline). Participation in a covenant group during the probationary period is part of the process of vocational discernment. For those who proceed into ordained ministry, it forms habits and practices of accountable covenant ministry that will continue through their participation in the Order of Deacons or the Order of Elders.*

## Expectations

1. Covenant groups of commissioned ministers may be organized in different ways.
2. Each commissioned minister is assigned by the board of ordained ministry to a peer group. Within the covenant groups, intentional decisions are made regarding logistics. These may include:
  - size and membership of covenant groups
  - frequency of meetings and expectations regarding attendance
  - confidentiality within the covenant group
  - the relationship of the covenant group to the board's evaluation processes
  - roles and patterns of leadership for the covenant group, including the role and authority of an assigned facilitator
  - length of a covenant group's life, and processes for forming and concluding the group
  - processes for including new members in the group and providing closure for those who leave it.
3. The board of ordained ministry establishes basic expectations for all covenant groups of commissioned ministers in the annual conference. The board establishes specific topics, areas of concern, or assignments, that may include:
  - vocational discernment with critical reflection on use of authority
  - reflection on continuing theological education curriculum
  - differentiating the mentoring program from the covenant group
  - the meaning and purpose of the Orders
  - spiritual disciplines
  - creation of a formal, written covenant for groups.
4. The board of ordained ministry is responsible for seeing that decisions regarding basic expectations are intentionally made, clearly understood, and carried out in each covenant group.

## Guidance for Supervision

### Mission

*Thorough assessment and careful supervision of new leadership in the church is critical for the development of effectiveness and a truly healthy church. Probationary members are supervised by both the district superintendent and the conference board of ordained ministry. The district superintendent oversees all commissioned ministers in the appointive ministry. This includes routine procedures such as clergy meetings, interviews, and annual reports about the probationary member. The board of ordained ministry oversees the processes toward full membership and ordination, sets time for interviews, and develops expectations for effectiveness in ministry.*

### Expectations

1. The board of ordained ministry is clear about its function, authority, and role of supervision of probationary members. In addition, the board understands the difference between its supervision and the supervision of the district superintendent.
2. The board of ordained ministry determines and communicates the expectations for the probationary member's annual report from the superintendent. Meetings, interviews, and reports are projected a year in advance.
3. The board of ordained ministry determines whether the superintendent's report about a probationer shall also include a recommendation for board action.
4. The board of ordained ministry respects the role of the district superintendent and the desire to have special gatherings or meetings for those in probationary membership. Expectations about attendance are clearly stated.

5. Guidelines for supervision of probationary members serving in extension ministries (elders) and ministries beyond the local church (deacons) are set forth in *The 2004 Book of Discipline*, ¶326 and ¶327. These guidelines should be shared with probationary members appointed to ministries outside local church structures.
6. Supervisory reports of probationary members are one factor used by the board of ordained ministry in making recommendations to the clergy session.

## Part 2: Preparation Process for Local Pastors in the Course of Study

The general church has also established a professional ministry preparation process for local pastors during their participation in the Course of Study. With a few modifications, it follows the pattern provided for commissioned ministers.

### Adaptation of the Components of the Preparation Process for Local Pastors

#### Mentoring

1. Local pastors are assigned a clergy mentor upon receiving an appointment.
2. In addition to the expectations of the mentoring relationship outlined previously, clergy mentors guide local pastors through the Course of Study.
3. Local pastors are assigned clergy mentors by the district committee on ordained ministry, in consultation with the district superintendent.

#### Education

1. The professional ministry preparation process for full-time local pastors occurs during their participation in the basic five-year curriculum of the Course of Study.
2. The length of the process for part-time local pastors will be extended until completion of the basic curriculum.
3. While participating in the basic curriculum, local pastors are assigned a clergy mentor who has the responsibility of guiding their progress.

#### Covenant Groups

1. Annual conferences may organize covenant groups for local pastors with purposes and expectations similar to those developed for probationary members.

#### Supervision

1. Both the district superintendent and the district committee on ministry supervise local pastors.
2. Annual certification by the district committee is required for renewal of licensing and appointment. The district committee will consider participation in the professional ministry preparation process as one factor in certification renewal.

## Part 3: Preparation Process for Clergy Transferring from Other Denominations

The purpose of the ministry preparation process during probation for clergy transferring from other denominations is to facilitate their entry into the United Methodist clergy covenant. The intention is to prepare them to satisfy the requirement of ¶347.3, *2004 Book of Discipline*:

- (a) On recommendation of the board of ordained ministry, the clergy members in full connection may recognize the orders of elders or ordained clergy from other denominations and receive them as probationary members or local pastors. They shall present their credentials for examination by the bishop and board of ordained ministry and give assurance of their Christian faith and experience. They shall give evidence of their agreement with and willingness to support and maintain United Methodist doctrine, discipline, and polity . . .

- (b) Ordained elders or ordained clergy from other Christian denominations shall serve as probationary members for at least two years and complete all the requirements of ¶335, *2004 Book of Discipline*, including courses in United Methodist history, doctrine, and polity, before being admitted into full conference membership.

## Adaptation of the Components of the Preparation Process for Transferring Clergy

### Mentoring

1. Transferring clergy are assigned a clergy mentor upon receiving an appointment.
2. In addition to the expectations of the mentoring relationship outlined previously, clergy mentors intentionally focus on transition into United Methodist ethos and identity.
3. Clergy mentors will facilitate reflection upon the required courses in history, doctrine, and polity as transferring clergy appropriate and integrate the content into their practice of ministry.

### Education

1. Before completing their probationary years, transferring clergy shall meet the educational requirements for conference membership specified in ¶330 or ¶335 of *2004 Book of Discipline*.
2. Before completing their probationary years, transferring clergy shall complete the required courses in United Methodist history, doctrine, and polity, ¶335, *2004 Book of Discipline*.

### Covenant Groups

1. Annual conferences may organize covenant groups for transferring clergy, or include them in other covenant groups for probationary members and/or local pastors.

### Supervision

1. Transferring clergy are supervised by both the district superintendent and the board of ordained ministry.
2. Specific attention is to be given to the ability of transferring clergy to express and give leadership in servant ministry within The United Methodist Church. See ¶326, *2004 Book of Discipline*.

## Mentoring and Cultural Location

The United Methodist Church is experiencing the gift of people called to ministry from a wide variety of ethnic, cultural and national backgrounds. These people have crossed traditional boundaries and move through the candidacy process, bringing the rich variety of the universal church to annual conferences and local churches in new, challenging, and enriching ways. The cultural background of the probationer may be quite different from those with whom they will serve. The mentor, and the covenant group, may present yet another racial, ethnic, national or cultural experience. Supervisors may carry expectations of ministry preparation, performance, and understanding that are insufficiently developed or skewed when applied to people from varied cultural, ethnic, racial, and national backgrounds. In generations past, the dominant culture established the norms and practices for institutional conformity. Theology, morality, language, and behavior were uncritically universalized by the dominant culture. This excluded those not from the dominant

cultural understanding forcing them to put their cultural, racial, ethnic, and national gifts “under a bushel” (at best) and adopt the dominant culture uncritically in order to navigate the journey. In recent years, the general church has been intentional about charting a new course.

The vision for the future of the inclusion of people in the covenant of ministry and the connection of congregations in annual conferences embraces the reality of a multicultural, multiethnic, multinational, and multiracial church. Not only is this represented in the meeting of the global church at General Conference, but is also experienced in the covenantal ministry of particular annual conferences. Demographic research and anecdotal reports of experience within annual conferences give evidence to the diversity of culture, race, ethnicity which continues to change and evolve throughout the connection. The faith vision of the church and the reality of its experience require an active commitment to discerning the ways in which culture, economic location, race, nationality, and the like are valuable, yet varied gifts exercised in ministering the gospel. It is especially essential that, in an environment when cross-cultural/cross-racial appointments are probable in a life of ministry, a climate of mutual enquiry, learning, and appreciation need to pervade the process of entry into ministry. This is especially true of the mentoring relationship and the gifts brought to that relationship. However, the covenant group and continuing educational experiences are also greatly enriched when the gifts of each are welcomed, understood and cherished. Sensitive supervision is crucial in these areas. Not only does it nurture the call and vocation of a person in ministry preparation, it also broadens and deepens the faith life of the whole church.

Boards of ordained ministry, the supervisory process, local church leaders, and mentors must dedicate themselves to critical reflection upon the gifts, graces, and gospel present in cross-cultural appointments and the rich reflection of the ecumenical (meaning global) church inherent in that experience. A climate of learning and appreciation is crucial to empowering future leadership. People involved in the ministry preparation process who seek to move beyond cultural and racial parochialism will also become leaders in fulfilling the vision of *shalom* that is grounded in the gospel of peace, justice, and the healing of Christ.

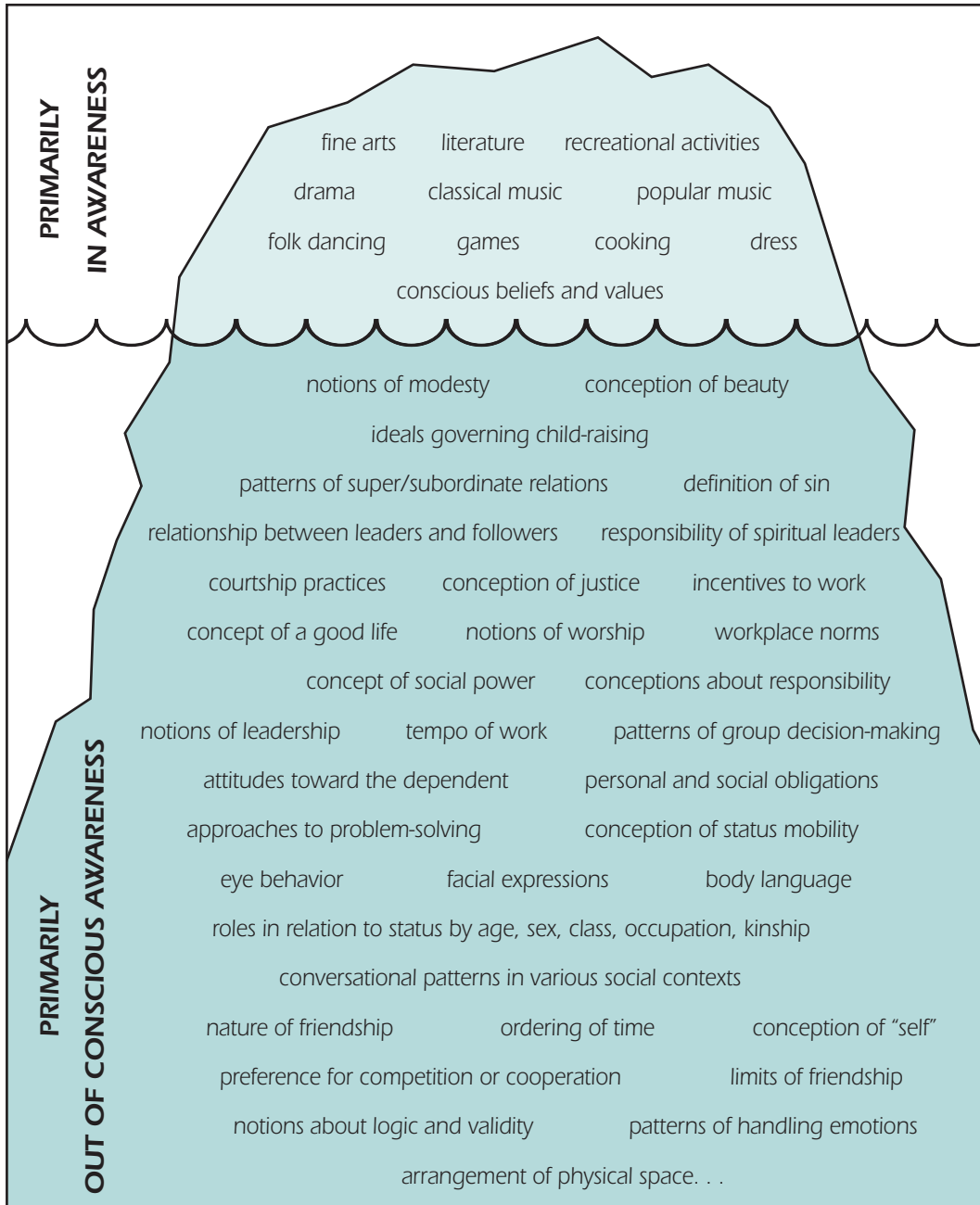
It is crucial to the development of an effective ministry preparation process that the issues of a multicultural, multinational, multilingual, multiracial church are acknowledged and celebrated by taking seriously the challenges and opportunities inherent in the journey together. This is most focused in the openness, training, and support of mentor/mentee relationships.

In her book *Meeting God at the Boundaries: Cross-Cultural–Cross-Racial Clergy Appointments* (Nashville: General Board of Higher Education and Ministry, The United Methodist Church, 2003), anthropologist and cross-cultural educator Lucia Ann McSpadden lays out the issues that surround making appointments in a cross-cultural context. Her analysis would help boards of ordained ministry to formulate principals, training and support for the ministry preparation process.

McSpadden gathers a poignant list of Euro-American characteristics that are often the fulcrum of judgment in leadership but are not universal in other cultures. “This culture places high value on *doing* rather than being, on *getting things done* rather than building relationships, on *individual responsibility*, on a sense of *future* as something we can plan for, and on *production and visible results* for which people are expected to be *task oriented* and *achievement focused*.” (McSpadden, p. 50)

Along with many other educators in cross-cultural sensitivity, McSpadden shares an iceberg graphic that illustrates those things in cross-cultural awareness that are readily visible and provoke inquiry and preliminary understanding. Those issues that are placed below the surface in the graphic are important to consider in the processes addressed by this *Tool Kit*, especially in the mentoring relationship, supervision, and evaluation. The issues below the surface are the deeply held, often unarticulated, and unacknowledged in frames of worldview, expectations, and behavior that need to be discussed, understood, and appreciated. This understanding will be crucial in the dynamic of the mentoring relationship, but most critical in the relationship between the ministerial leader and the congregation to which they are appointed.

## Culture as an Iceberg



**Just as nine-tenths of an iceberg is out of sight (below the waterline), so nine-tenths of culture is out of conscious awareness.**



One of the scales used by anthropologists and cross-cultural educators draws distinctions that are helpful indicators of the way in which people understand participation in a group and how leadership is exercised. Brief descriptions are provided here to stimulate the need and beginning conversation/understandings of boards, mentors, and supervisors. Further reading may begin with McSpadden's book.

### **Collectivist/Communal Culture versus Individualist**

Many cultures are *collectivist* in that the immediate and extended family, the clan, or some other group is the primary unit of identity. In contrast, *individualist* cultures focus on the individual. The family, clan, or other group exists for the enhancement of the individual. When problems arise, people often seek aid outside the group, such as doctors, financial advisors, clergy, and therapists. People in collectivist cultures tend to use professional aid when the professional is a member of their group. Members of collectivist cultures resist sharing problems with strangers beyond the basic group.

### **Low Context versus High Context**

*High-context* cultures convey meaning with the use of symbols, rituals, position, or role. In high-context cultures people are familiar with the expectations for leaders and members; therefore, members of the culture sometimes do not need to use language to convey meaning.

In *low-context* cultures, language is the primary vehicle for interpreting human interaction. In these cultures, people rely on words—written or oral—to convey what they want and mean. In low-context cultures a written order of worship is essential in church services

### **High Power Distance versus Low Power Distance**

In *high-power distance* cultures, says anthropologist Edward Hall in his book *Beyond Culture* (New York, Doubleday, 1976), there is a clear demarcation of the responsibility of leaders and members to guide and care for the members. High-power distance cultures are hierarchical socially, politically, and theologically. People in these cultures will participate in group discussions only when specifically called upon by the leader.

In *low-power distance* cultures, members identify with the leader, because all the leaders come from the group. Low-power distance cultures are egalitarian socially, politically, and theologically. Leadership is exercised from within the group.

### **Polychronic versus Monochronic**

*Polychronic* cultures receive time as a gift and a given. There is no concept of time as a reality that can be wasted. In polychronic cultures the primary emphasis is on *relationships*. By contrast, in *monochronic* cultures time is a commodity that must be managed and used, never wasted. Monochronic cultures are, therefore, *task* oriented.

In a polychronic culture, the time for a worship service to begin and end depends upon the needs of the worshipers and the way the service unfolds. Oftentimes, unexpected actions occur during the service, influencing the time the worship service will end. In monochronic cultures, by contrast, the worship service begins and ends at an appointed time. An order of worship guides the actions of worship from beginning to end and there is usually no deviation from the order of worship.

### **Status by Ascription versus Status by Achievement**

*Status-by-ascription* is bestowed by a culture in terms of who a person is. This comes through roles such as family, age, gender, ordination, etc. Status does not need to be earned and achievements, though important, do not inhere to the status in direct proportion. On the other hand *status-by-achievement* is usually related in a more direct fashion to performance.

Clearly, the rich diversity of the cultures of the world is consistently gathering in the specific and particular places where ministry is experienced. Especially in the process of

ministry preparation, it is imperative to attend to the dynamics and strategies to engage this gift of God's reality effectively, as Christ would envision it. Not only is this imperative for ministry preparation, but also is a model for the conduct of ministry throughout the life of the church.

Below is a tool to help mentors and mentees identify their own cultural location and to begin a conversation about what this means for the mentoring process.

*Question:* Where do you find yourself on these four continuums of cultural distinction? Find and mark your place in each continuum.

a) High-Power Distance 1 . . . 2 . . . 3 . . . 4 . . . 5 . . . 6		Low-Power Distance
dis-identify with leaders hierarchical— socially, politically, theologically	identify with leaders egalitarian	
b) High Context 1 . . . 2 . . . 3 . . . 4 . . . 5 . . . 6		Low Context
meaning through complex of symbols, rituals, office	meaning conveyed through content of language	
c) Polychronic time 1 . . . 2 . . . 3 . . . 4 . . . 5 . . . 6		Monochronic Time
live life, accept time as gift relational orientation	use, manage, don't "waste time" task orientation	
d) Collectivist culture 1 . . . 2 . . . 3 . . . 4 . . . 5 . . . 6		Individualist Culture
basic unit: family, clan, or group extended family	basic unit: individual nuclear family	



## Chapter 2: Resourcing the Professional Ministry Preparation Process

The Ministry Preparation Resource Team is available to assist annual conference leaders in developing their process. The partnership includes the following:

### Step 1—Initial Contact

The conference leadership team will contact Anita Wood (615-340-7375) at the General Board of Higher Education and Ministry, Division of Ordained Ministry, in Nashville, Tennessee. The Division of Ordained Ministry covers travel costs for members of the Ministry Preparation Resource Team, while food and lodging expenses are the responsibility of the annual conference. No honorarium is required.

### Step 2—Consultation

Members of the Ministry Preparation Resource Team will meet with appropriate annual conference leaders to assess the current conference situation and reflect on plans for the ministry preparation process. Experience has demonstrated that the consultation is enhanced by the presence of representatives of the cabinet, members of the board of ordained ministry, representatives of district committees on ordained ministry, and those designated for developing and leading the ministry preparation process.

The following responsibilities of annual conference bodies will be addressed:

- definition of the characteristics of clergy effectiveness in the annual conference
- determination of the role of the preparation for ministry process in developing effective servant leadership for the annual conference
- creation of a comprehensive plan including the four components of the process
- development of a strategy to implement the ministry preparation process
- designation of the leadership to develop the professional ministry preparation process
- determination of the sources of funding
- recruitment, assignment, support, and training of leadership
- design of a long-term plan for sustaining the process.

The conference leadership team and Ministry Preparation Resource Team will agree on mutually acceptable means of addressing needs identified in the consultation, clarifying expectations, roles, functions, responsibilities, and financial arrangements.

### Step 3—Ministry Development and Implementation

The Ministry Preparation Resource Team will continue to assist annual conference leaders as specified in the agreement. This assistance may include the use of Resource Team members as trainers/facilitators for clergy mentor orientation and/or training events; covenant group development; consultation on supervisory practices; and designing models for continuing theological education. The goal is to equip conference leaders to implement an on-going, self-sustaining ministry preparation process.

### Step 4—Evaluating the Ministry Preparation Process

In order to maintain a focus on effectiveness in ministry, evaluation should take place throughout the process. Effective evaluation includes process leaders and participants, as well as persons impacted by the ministry of those involved. Specific suggestions and concerns for each component are found in subsequent chapters of the *Tool Kit*.

The board of ordained ministry has the responsibility for developing models for evaluation. Upon request, the General Board of Higher Education and Ministry will conduct a confidential evaluative process. Periodic surveys across The United Methodist Church will be carried out by the General Board of Higher Education and Ministry.

# Chapter 3: Clergy Mentoring

## The Role of the Mentor

### Section XII. Mentoring and Mentors

¶349. Mentors—1. Mentors shall be recommended by the cabinet, selected, trained, and held accountable by the board of ordained ministry. There are two categories of mentor, each with distinct functions and responsibilities as follows:

- (a) Candidacy mentors are clergy in full connection, associate members, or full-time local pastors who have completed the Course of Study trained to provide counsel and guidance related to the candidacy process. Candidates will be assigned a candidacy mentor by the district committee on ordained ministry in consultation with the district superintendent (¶311). Candidacy mentors will work with the candidate until that candidate begins serving in an appointive ministry as a local pastor or a commissioned minister.
  - (b) Clergy mentors are clergy in full connection, associate members, or full-time local pastors who have completed the Course of Study trained to provide ongoing oversight and counsel with local pastors and probationary members pursuing ordained ministry. Local pastors will be assigned a clergy mentor by the district committee on ordained ministry in consultation with the district superintendent. Probationary members will be assigned a clergy mentor in full connection by the conference board of ordained ministry in consultation with the district superintendent. A candidacy mentor may continue with the same person if trained to serve as a clergy mentor.
2. Mentoring occurs within a relationship where the mentor takes responsibility for creating a safe place for reflection and growth. An effective mentor has a mature faith, models effective ministry, and possesses the necessary skill to help individuals discern their call in ministry. Mentoring is a part of the preparation and growth for inquirers and candidates for ordained ministry, local pastors, and probationary members of an annual conference. Mentoring is distinct from the evaluative and supervisory process that is a part of preparation for ministry.
  3. The conference board of ordained ministry may assign one mentor to work either with one individual or with a group of local pastors and/or probationary members. Persons transferring from other denominations will also be assigned a clergy mentor (¶347.3b).
  4. Clergy mentoring begins when a person receives an appointment as a local pastor or as a commissioned minister entering probationary service.

—From *The United Methodist Book of Discipline 2004* © 2004 by The United Methodist Methodist Publishing House. Used by permission.

### Models

“Ministry in the Christian church is derived from the ministry of Christ. . .” (¶301.1, *2004 Book of Discipline*). Jesus is the formative model of mentoring for Christian ministry. Just as Mary acknowledged Jesus as **rabbi** in the resurrection garden, so we embrace Christ as **rabbi** and model of mentoring others into Christian ministry. Within the mentoring relationship, there is an acknowledgement of being **fellow disciples** of Christ Jesus. In addition, we relate to one another as Christ has welcomed us, “. . . no longer servants, but **friends**.” (See John 15:12-15). It is crucial to model the quality of friendship in mentoring relationship that was present in the relationships of the disciples and others for whom Jesus was a mentor. Mentoring relationships are primarily partnerships in ministry. Examples in both Old and New Testaments can be called upon to form

the “great cloud of witnesses” to the mentor and mentee who journey together in this relationship.

Many biblical models of mentoring find their roots in the importance the Levites placed on perpetuating the rites and duties that are assumed in the leadership and spiritual well-being of the people of God. This was affected in the schools that trained the prophets beginning with Samuel. These schools not only established a curriculum of theological and devotional knowledge as well as practices, they also were intended to discern the suitability of a person for specific leadership among the people. Some became prophets, others returned home.

There are multitudes of mentoring relationships within scripture, the history of the church, and the experience of our lives. Mentors in ministry preparation are encouraged to gather their “cloud of witnesses” and reflect upon them as models and examples. Boards of ordained ministry are encouraged to gather these models for continuing education among mentors. Ruth and Naomi, Elijah and Elisha, Paul and Barnabas, Priscilla, and the leaders of the early churches each yield gifts and examples (as well as cautions) for mentoring relationships.

However, the richest resource for a model of mentoring is at the root of Christianity, the ministry of Jesus Christ. Within the context of the covenant they shared, Jesus modeled ministry and reflected on ministry in confidential exchanges, public dialogues, and in the practice of ministry. The formative exchanges focused on theological formation for ministry and devotion, spiritual formation, and empowerment to assume a role in Christ’s ministry based on giftedness, introspective questioning, guidance, and direction, group discussion. Contextual exegesis of scripture, and rabbinic-style interpretation of scripture formulated a new midrash and body of authoritative parables. The expansion of Mosaic tradition to new interpretations (“but, I say to you . . .”), set the disciples to particular experiences of ministry.

In addition, Jesus exhibited the essentially human capacity to listen, learn and grow in understanding (the Syro-Phoenecian woman’s interaction with Jesus not only resulted in the healing of her daughter, but a larger vision of Jesus’ mission). Mentors in the Jesus model must always be open to the mentee’s relationship as **fellow learners with the capacity to listen and to learn**. As Jesus exemplified in his leadership, mentors must also adopt, as part of their mentoring ministry, time to withdraw to pray and reflect.

However, the Jesus model of friendship **did not mitigate against evaluation, correction, re-direction, intervention, or confrontation**. The Gospel of Mark often uses starkly vibrant language in Jesus mentoring the disciples in their ministry. Direct, some may call it. Jesus also accepted the failures and shortcomings of the disciples, developing strategies and advocating for them. When the disciples’ culturally influenced aspirations (such as sitting at the right hand and left hand) emerged as driving their ministry, chastening and revisioning was appropriately introduced. After a difficult passage of ministry that demoralized and shook the faith, confidence, and call, Jesus inspired a renewed focus on “feeding my sheep” and offered dynamic hope. Jesus was also clear that there are expectations and boundaries for those who are ministers and disciples.

Within the relationship of mentor and mentee in the context of the ministry of the church, there is the hope of each growing more fully into the call and claim of Christ within the general calling of the church. There is also hope that the congruence between faith, understanding, and practice emerge more fully through this process. In many ways this process seeks to be Pentecostal in nature. It is an intense relationship that invokes the mentoring model of Christ and the refiner’s fire of the Holy Spirit.

## Five Touchstones of Mentoring

Five touchstones of relationship exist between God, the commissioned minister, mentors in ministry, and the church. They are briefly described below as a preliminary resource in the process and will be more fully explored in *Mentoring Into Vocation*.

**Call:** The elements of the ministry preparation process and the practice of ministry will have

an important impact on the sense of call and vocation. As part of the mentoring relationship, renewing and revisioning the call is imperative to keeping it vital in the life of ministry. God's claim and the community's response are central to reflecting on the constant need to articulate one's vocation afresh as it empowers ministry.

**Covenant:** A personal sense of calling and vocation is gathered up in the covenants that God has made with the community. This aspect of mentoring is both personal and communal. It centers on the way in which the scriptural covenants, the covenants of the tradition and the denomination, as well as the personal sense of covenant with God, church, denomination, family, and friends come together. Reality testing, expectations, responsibility, and conflicting priorities must be worked through at this stage. Integrity in faith and life are focal points. Realized hope and eschatology are areas to reflect upon.

**Context:** As the process of ministry preparation unfolds, it becomes more and more necessary to understand one's calling and the covenants in which one is engaged within the immediate context of ministry. In some ways, this is dealing with "Pentecostal fire" in that the context refines the call and covenants in particular ways. The key is to help in the process of the refiner's fire, but without the call or the covenant faith being consumed. This is a time when the safety of the mentoring relationship is crucial, yet the courage of the mentor and the encouragement needed to engage the context with one's whole self-in-ministry is required.

**Credo:** It is an important skill to locate the journey of the people of God whom we serve within the biblical and traditional, historical narrative of the church. This empowers dynamic and faith-empowered leadership. Out of an understanding of the narrative, theological imagination and claims are made. With the resources of a theological education and the categories of theological imagination and systems available, the mentoring team has the ability to engage their own theological reflection in reaction to what is being experienced in context. This aspect of the mentoring relationship empowers the courage of a person in ministry to lead through faith in what God is doing in the here and now. Exercising one's capacity for theological reflection and understanding in a trusted and committed relationship is vital to developing a faithful ministry of leadership.

**Connexion\*:** The vocation is not our own, but is understood within the larger calling and purpose of the Body of Christ, the community of believers. The relationship of mentoring is within a larger context of responsibility to the members of a particular order in the church. Although there are various levels of confidentiality, this relationship is not a secret or personal relationship, but has the confidence of the entire Body to nurture and mature the calling and covenants made by the participants. Further, it has the confidence of the Body to develop the skills and wisdom of contextualization and the acuity, faith and courage of standing upon and leading from the credo that emerges.

## Suggested Standards

1. Mentoring is a practice of the gospel of Jesus Christ.
2. Mentoring exists to provide a relationship of confidentiality in which a mentee can grow in effective leadership as a clergyperson. Early on, the mentee and mentor must read and have a common understanding of the annual conference's policy statement on confidentiality. Adherence to this policy is expected of everyone. Violating or feeling pressured to violate the confidentiality of the mentoring process damages the entire annual conference plan. Clarity about what is to be shared and in what context sharing is to happen is a key building block for the annual conference mentoring ministry. Annual conference policies may specify limitations on confidentiality, for example: clergy misconduct or information required by state law. When the mentor is the subject of possible misconduct, sharing information is risky for the mentee, since it may damage the relationship—and vice versa.

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\*From *Mentoring Into Vocation* by Mark Fowler. Published by the General Board of Higher Education and Ministry of The United Methodist Church, copyright © 2006.

In such instances, the mentor and mentee should follow the complaint procedures outlined in ¶362, *2004 Book of Discipline*.

3. Mentoring relationships are covenantal by design and discipline. The mentoring covenant, mutually agreed upon by mentor and mentee, is an expression of the clergy covenant in the annual conference. Positive mentoring occurs when there is clarity in the structure and commitment to the relationship. Gayle Holmes of the MENTTIUM Corporation, an organization specializing in corporate mentoring systems, focuses on mentoring relationships in a wide range of institutional settings.

*Chemistry and personality match are irrelevant. Discipline and commitment to the relationship and its goals are what matter . . . People who were part of informal mentoring situations that we observed, no matter how bright and caring, didn't know what to do . . . We initially thought you didn't have to structure these relationships, that all we needed to do was to match people up and get out of the way. We found that planning and goal setting and establishing a protocol for the relationship was very important.*

–From “Mentoring Misconceptions,” *World Traveler* (September 1997), pp. 38-39

4. The evaluative processes of the district and the conference, as well as the appointive processes of the cabinet, are separate from the mentoring relationship. In fact, mentoring is effective only if the mentoring relationship is not part of the evaluation or screening of a probationary member.
5. The mentoring ministry is an effective way to stimulate continued learning and ministry formation in both mentor and mentee.
6. Organizational responsibilities, relationships, and reporting must be clearly defined for mentee, mentor, superintendent, district committee, and conference board.

## Forming the Covenant

The formal, written covenant fashioned for the mentoring relationship reflects a sharing of call, vocation, disciplines, and authority. Covenants are three-dimensional, involving the mentor, the mentee, and God's presence. Mentor and mentee reflect together on biblical covenants.

Discussion of the elements of these is helpful as they develop and agree upon their own covenant.

The following questions may help the participants in formulating the elements of the covenant.

1. How can boundaries of trust and respect be established and maintained?
2. When either or both no longer feel safe because their willingness to be vulnerable has been threatened, how can the relationship be ended in a respectful manner?
3. What can be done to make sure that sharing the journey of ministry is more important than fixing specific problems?
4. When necessary, how can the mentor “speak the truth in love” regarding effectiveness in ministry in such a way that the mentee feels empowered to face issues head-on? There may be instances in which it becomes clear that pursuing ordained ministry is not in the mentee's best interest. In such cases, the mentor should carefully encourage the mentee to explore his or her call and gifts again in order to assist the mentee to consider other appropriate expressions of ministry.

While drafting the covenant, participants seek agreement on specific issues. These may include:

- learning goals (for local pastors enrolled in the Course of Study, the curriculum is part of the focus)
- resources to be used (materials, persons, events)
- shared expectations
- meeting frequency, dates, times, and places
- responsibilities for preparation and follow-up.

The covenant should conclude with a commitment statement such as the following:

We, the undersigned, enter into a covenantal relationship and commit ourselves to fulfill the details of the covenant written above. It is our hope and prayer that in this process of sharing and mentoring we will learn from each other. We make this covenant in the name of Jesus Christ.

Signed: \_\_\_\_\_  
*Mentor*

Signed: \_\_\_\_\_  
*Mentee*

Date: \_\_\_\_\_



## Who Can Serve as a Mentor?

On what basis should people be invited to consider being a mentor? According to the *Book of Discipline*, it is the task of the cabinet to recommend mentors. The board of ordained ministry selects and trains clergy mentors and holds them accountable. For commissioned clergy, the board of ordained ministry and district superintendent are to consult in the assignment of mentors. For local pastors, the district committee on ministry, and district superintendent are to consult in the assignment of mentors.

The following criteria are recommended to the BOM for use in selecting mentors:

A mentor

- has faith in Christ.
- relates biblical images and theological understandings to the practice of ministry.
- listens actively and hears others.
- nurtures others with sensitivity.
- communicates compassion and understanding.
- exudes self-confidence and self-esteem.
- manifests joy, humor, and laughter.
- understands the role of supervision and mentoring.
- commits time to a continuing covenant relationship.
- exercises appropriate boundaries.
- models the spiritual disciplines.

The protocol for assigning and supporting mentors influences the effectiveness of the mentoring ministry in the annual conference. Some conferences ask mentees to nominate their own mentors. Other conferences assign mentors based on geography or other factors. Conferences may select and train mentors as needed, others may develop a pool of mentors for assignment.

A few conferences provide opportunities for mentors to reflect in a structured way on their experience of the mentoring relationship. Many conferences simply assign a mentor to a mentee and leave it up to them to structure the relationship as they see fit. There is no subsequent reflection on the experience.

A person can begin as a candidacy mentor and then continue as a clergy mentor, following the same candidate through the probationary process or the Course of Study. If the relationship is positive and disciplined, it serves to strengthen the various stages of ministry.

It is not always possible for someone to serve as one person's mentor throughout the process of preparing for ordained ministry. The length of a particular mentoring relationship is determined by several factors.

1. Not every mentoring assignment works out. Sometimes the persons matched are not able to create a covenantal relationship and quality mentoring becomes impossible. Each annual conference must have a clear and simple way in which a mentee or mentor can request reassignment. This should be a routine part of the information about entering the mentoring process.
2. When assigning mentors and mentees, conference leaders should consider cross-gender and cross-cultural matching. Such matching can provide excellent learning opportunities for new clergy. Assigning mentees cross-culturally can enhance their growth beyond their own racial or cultural norms. Cross-racial assignments can be appropriate for mentees from both majority and minority cultures. For clergy from minority population groups, mentoring can be a vital link for acceptance among their cultural peers. Sensitivity to the cultural norms and the needs of new clergy within these cultures becomes an important part of the assignment process. One mold does not fit all.
3. Issues of human sexuality are present in the mentoring relationships, as they are in any other ministry setting.

One of the expectations of mentees is that they will be honest in their meetings with their mentors. One natural outgrowth of honesty in that context is that the mentee will be asking serious questions, confessing failures, and showing vulnerability. Where the person with lesser power shows appropriate vulnerability, the power carrier, in some instances, has perceived and confused the attractiveness of the vulnerability with invitation to sexual intimacy.

–From “Daring to be Intimate: Male Supervisors Working with Female Supervisees in Theological Field Education,” by Martha Gilmore and Emma J. Justes, *Journal of Supervision and Training in Ministry* 7 (1993), p. 210.

## Implementing a Clergy Mentoring Ministry

In addition to the general steps outlined in chapter 2, conference leadership must complete the following steps in the development of clergy mentoring ministry:

- Adopt board policies for clergy mentoring regarding confidentiality and reporting.
- State the role of clergy mentors in contrast to supervisors of new clergy.
- Write goals, standards, and guidelines for clergy mentoring
- Determine the mentoring format (one-on-one or group).
- List qualifications, roles, and tasks of mentors.
- Obtain consensus with the cabinet on the process of recommendation, recruitment, and assignment of clergy mentors.
- Develop and communicate policies and procedures for district committees regarding mentoring for local pastors.
- Articulate the system for accountability and evaluation of the mentoring process.
- Delineate the expectations of commissioned ministers and local pastors regarding mentoring.
- Develop a plan for sustaining the mentoring ministry.

## Evaluating the Mentoring Ministry (Annual Assessment Process)

Evaluation is a process of celebration, growth, direction, revision, and reflection. To use evaluation time effectively, it is important to re-visit the call, covenant, mission, resources, and expectations shared throughout the system as a plumb line for evaluation. As the board of ordained ministry evaluates the mentoring ministry of the annual conference, it does so within the vision and context of the total ministry of the annual conference and The United Methodist Church. From this perspective, the evaluation will shape and guide the principals that will undergird the evaluation of those within the ministry preparation process, the partners who participate in the process, the work of the board and the effectiveness of the annual conference.

Evaluation is, therefore, organic and systemic. The ministry preparation process cannot be isolated from the larger vision and mission of the church, the effectiveness of the annual conference, board of ordained ministry, local church and the resources and support systems that surround, nurture, evaluate, and judge a commissioned minister on the journey from readiness to effectiveness.

It is incumbent upon the leadership of the board to engage the key leadership as it undertakes the process of evaluation. It is also important to share the results broadly, with a clear articulation of the gifts and resources, as well as the cutting edges and deficits needing to be addressed.

In this way, the commissioned minister's evaluation can be conducted within the context of self-awareness, shared expectations, a realistic vision, and faithful hope for effective ministry within the covenant ministry of the annual conference.



Use the following items as a checklist for evaluating the mentoring ministry of your annual conference. Every ministry environment includes the items on this list. As the board of ordained ministry, district committees on ordained ministry, and the cabinet consider the mentoring ministry of the conference, using the components below as guidelines ensures an effective mentoring ministry.

1. Ecology: Shared articulation of expectations for effectiveness in ministry
  - Articulate as clearly as possible with the board, cabinet and other partners what gifts and graces are expected for effective covenant ministry within the annual conference.
  - Reflect on the visions and hopes of the annual conference in order to realistically assess what will be expected in the short and long-term leadership of the annual conference.
  - Ascertain the placements of commissioned ministers and assess how this will effect and shape the mentoring process.
  - Work with the cabinet to develop clear and reasonable expectations for clergy mentors, the contributions of settings, the support of colleagues, and the standards of supervision and reporting during the commissioning process.
2. Mentors are crucial gifts to mentees and the hope of the formation of effective leadership
  - Receive from the cabinet recommendations of possible mentors.
  - Provide mentors training, expectations, accountability, support, and channels of communication.
  - Approve mentors using established criteria of the annual conference, *Discipline* and this *Tool Kit*.
  - Reassess annually a person's gifts and resources for mentoring, including time demands and priorities.
  - Affirm that mentoring is not a universal gift of the clergy, but a specific set of gifts, skills, and calling. It is also important to affirm that no one can mentor for an indeterminate period of time.
  - Encourage mentors to have mentors of their own.
  - Assign mentors and mentees, provide for review of the effectiveness of the relationship.
  - Review the mentoring assignment annually.
  - Provide a process for both mentees and mentors to seek reassignment.
3. Standards & principles guiding the annual conference mentoring process
  - Involve the board of ordained ministry, the district committee on ordained ministry, and the cabinet (and perhaps the clergy session of the annual conference and/or the Order of Elders and the Order of Deacons) in the adoption of definitions and standards for the mentoring ministry of the conference.
  - State the expectations, based on the standards, in terms of which mentors will be assigned and their performance evaluated.
  - Review the standards at least every second year. Feedback from the constituents of the process should be part of this review. Special consideration should be given to the evaluation of the process by the mentees and mentors.
4. Supporting the calling and vocation of mentors: factors that energize those involved in mentoring
  - Recognize and celebrate mentors in personal (one-to-one) and public ways in the annual conference and local churches.
  - Keep before local churches and annual conference leaders the time and commitment mentoring ministries require, even though the ministries are exercised in ways that are not immediately visible.
  - State clearly the expectations, focus of attention, and outcomes from the mentor/mentee relationship. Be clear about ways in which this will be judged and/or evaluated both formally and informally.

- Provide support groups, perhaps covenant groups, where a mentor can reflect upon their experience and receive group mentoring.
  - Design continuing education and training for mentors to grow and develop in this important ministry.
5. Ethos: the environment in the conference where the mentoring ministry takes place
    - Clarify with mentors and mentees the conference and board culture as it regards mentors, both formal and informal. Do not assume that either mentors or mentees know the expectations, time commitments, reporting structures, confidentiality assumptions, or rationale for assignment.
    - Define the system and diagram the mentor's relationship and responsibilities to superintendent, board, and district committee. Acknowledge and work through strategies that deal with multiple relationships and roles within the covenant of ministry.
  6. Evaluation: the way in which mentoring is assessed and valued
    - Establish specific criteria, timetables and methodologies for assessing and valuing mentoring based on the standards adopted earlier.
    - Establish specific criteria, timetables, and methodologies for evaluating particular mentors and their effectiveness based on those standards, especially if the standards shift.
    - At regular intervals, review and revise the assessment process itself, perhaps using an outside consultant. This will be especially important as boards and cabinets change.

Though annual conferences will apply them differently, these six components occur in all mentoring processes—in healthy or unhealthy ways. They are listed in linear fashion, but may be implemented in orders and ways that are effective in the context of the annual conference culture. These guidelines are not intended to establish complex governance systems of the process, but form the practice of the ministry preparation process in effective ways.

## The Mentoring Report

The board of ordained ministry is responsible for developing an annual reporting process. The report is used to verify participation in the process. It may be as simple as a signed statement by both mentor and mentee verifying participation in the process. It may be a fuller description of the topics covered, agreements or events than it is descriptive of the relationship. Any judgment rendered, advocacy, opinions, or ratings are evaluative and should be avoided. The supervising aspects of the superintendent and board are meant to be evaluative in terms of the system in this process. Within the confidence of the mentor/mentee relationship there is a consistent valuing, advocating, and discernment transpiring between the parties. However, this is a matter of covenant within the confidence of the relationship and not a mechanism for screening or absolving the supervisory processes from their critical work. A more detailed process for writing the report is found in *Clergy Mentoring: A Manual for Commissioned Ministers, Local Pastors, and Clergy Mentors*, page 15.

## Mentoring in Pairs or Groups

The materials in *The Clergy Mentoring Manual* assume that an annual conference board of ordained ministry will provide covenant groups, as well as one-to-one clergy mentoring. This is the ideal. However, many factors affect how each conference will decide how to provide and sustain quality clergy mentoring, including the budget and the leadership required.

Due to the number of available full-member clergy, associate members, or full-time local pastors who have completed the Course of Study, as well as their ability to be good mentors, mentoring in groups can be a workable alternative to one-to-one mentoring. Such groups may be effectively led by one or more facilitators who are trained as clergy mentors and who also are skilled leaders of small groups. Training for this specialized function is essential. Also, having a person present to reflect on and learn from the mentor's leadership in the group is necessary.

Groups for mentoring commissioned ministers may also serve as covenant groups, provided the purpose of each function is clearly articulated and implemented. Theological reflection on call, vocation, and practice of ministry forms the core experience of clergy mentoring in both paired relationships and groups.

## Guidelines for Group Mentoring

### Group Covenant

As with one-to-one mentoring, groups need structure and direction. Each participant will write a personal covenant statement. The group as a whole will write a common statement. The group covenant articulates in basic terms the disciplines of the group. The group can use questions like the following to construct its disciplines:

- What is the expectation regarding attendance?
- When and how often does the group meet, and how long is each session?
- Are group members expected to prepare for each session or do assignments following the session?
- What will be the focus for the group through the year?
- What is the role of the mentor as group facilitator?

The covenant also contains the definition and expectations about confidentiality regarding matters shared within the group. Reporting will also be understood and done in a way that does not violate the confidentiality of group members. All participants must sign the covenant.

### Spiritual Formation in the Group

Spiritual formation in the group begins with members telling about their call, vocation, spiritual disciplines, and authority. A retreat setting may facilitate the first gathering, since it allows participants to share information and get acquainted in a relaxed atmosphere.

The prayer, worship, and ritual practices of the group deserve attention and preparation. The whole group should make the decision about these practices, not just the mentor-facilitator.

### Frequency and Length of Meetings

The frequency and length of meetings will vary, depending on geography, ministry settings, and other conditions. For example, in districts or annual conferences where group members have to travel long distances to meetings, the group may decide to meet only two or three times a year, with each meeting lasting two to three days. Between sessions members can communicate via telephone, e-mail, or surface mail. Prayer partners help undergird the group, even when it is dispersed.

In settings where travel is not an issue, the group may choose to gather monthly for two to three hours at a time. In some places the group may even decide to meet every week. Some groups may elect to hold an occasional recreational gathering in which family and special friends can participate.

### Group Expectations

From the start members must be clear about the group's expectations of each participant and of the mentor-facilitator.

- What expectations govern leadership, preparation, and participation in the group?
- How is responsibility for preparing sessions assigned?
- Who will design and lead worship times?
- If a session has reading material, do all members have to read the material or only a designated few?
- How do group members become aware of important ministry events?
- If site visits are planned, what sites and people will be included?
- How will the group share responsibility for building relationships?

- How will the group keep one another accountable for observing worship and prayer opportunities and for following the meeting agenda?

When a member reports a ministry event, what (if any) feedback is expected from the rest of the group? Does such reporting happen with the whole group present or is it to be done on an individual basis? Should the group prepare a report about its life together, with evaluative statements about the mentor-facilitator, or is reporting the responsibility of individual members? Is the group newly configured each year, or does a given group have a longer life expectancy?

## Meeting Style and Nature of the Group

In determining the style and nature of the group, members should reflect on questions such as: what style of meeting does the group prefer? That is, will members participate only through group discussion or will role-play and other processes also be used? What will be the schedule for sharing ministry events? In considering these questions, participants should keep in mind that the focus of the group is to be a mentoring group. It is not a therapy group or a consulting group. While mutual support is part of the style and nature of the group, a covenant group is not simply a support group.

Each participant uses the group to help reflect on his or her identity, roles, and authority in the clergy office to which he or she is appointed.

## Role of the Mentor-Facilitator

A mentor helps to create a safe place for the members of the group to share and explore their call, roles, and vocational office. To have a positive group process, it is vital that the mentor be at ease with group processes and be clear about his or her role in these processes. The mentor-facilitator is not a fix-it person for group members. Nor should she or he be expected to be an expert in issues of ministry. The role of the mentor is to help group members focus on issues of role, authority, and office. Mentors help group members to reflect theologically about their ministries and to talk about the struggles, anxieties, and joys of ministry.

We encourage the annual conference to provide consultative help for the mentors which they may call upon throughout the year. This backup support allows mentors to review the group processes they use, to clarify their function in the group, and to gain resources for effective leadership. In the absence of such support, mentor-facilitators may well get into situations that are harmful to themselves and to the group. Backup support must be shared with the group and the meaning of confidentiality clearly defined.

## Mentoring in Extension Ministries (Elders) and Appointments Beyond the Local Church (Deacons)

Paragraph 326.3 of the *Book of Discipline* states that probationary members shall be supervised by the district superintendent under whom they are appointed, and shall be assigned a deacon or elder as mentor.

Mentoring relationships for commissioned ministers appointed to extension ministries (elders) or appointments beyond the local church (deacons) within the annual conference may require adaptation in order to address issues arising in each unique situation.

When the commissioned minister is serving in an extension ministry (elders) or an appointment beyond the local church (deacons), the board of ordained ministry may request that the commissioned minister nominate a qualified person in the location where the commissioned person is serving to act as mentor. However, the board of ordained ministry is encouraged to maintain a connection with persons in extension ministries or appointments beyond the local church. Such contact may include site visits, annual interviews, and regular e-mail correspondence. Probationary members serving in settings beyond their home conference should also take the initiative in sustaining a connection with their home conference.

## Chapter 4: Continuing Theological Education

During the probationary period, arrangements shall be offered by the board of ordained ministry for all commissioned ministers to be involved in a curriculum that extends theological education . . . (See ¶326, *2004 Book of Discipline*)

The probationary period is a time for commissioned ministers to live out and practice information gained through the seminary experience. The continuing theological education proposed during this time is an attempt to extend and supplement theological education. The board of ordained ministry may develop a curriculum to be offered to all probationers, or provide continuing education opportunities that allow the probationers to choose what would be most helpful. The board of ordained ministry may partner with United Methodist seminaries to provide continuing theological education events or online learning opportunities.

Research has found that this component of the probationary experience is the most developed by boards of ordained ministry. For some boards of ordained ministry, it is the orientation and education of the conference culture and norms for those preparing to become members in full connection. The Ministry Preparation Resource Team makes the following recommendations to boards of ordained ministry:

- Ensure that quality continuing education offered is based on needs identified by the board of ordained ministry and the probationers.
- Require regular participation of probationers in continuing theological education throughout the probationary period.
- Review the continuing theological education program regularly to avoid duplication of seminary work, placing the emphasis on practical issues that relate to the probationers' needs in their ministry setting.
- Consult with probationers and give opportunity for choice of continuing education opportunities.

Annual conferences may choose topics and develop skill sets based on the topics for those in the process. Such topics might include stewardship, conflict resolution, or leadership development. If this model is used it is important to seek input from the probationers and include topics needed for the development of the probationers.

An alternative model is to require that continuing education units be earned by those in the process allowing individual selection, of events, with the approval of the board of ordained ministry.

Retreats that provide continuing education to probationers, while giving time for covenant groups to meet, enable those in process to form relationships within the covenant community.

# Chapter 5: Covenant Groups

During the probationary period, arrangements shall be offered by the board of ordained ministry for all commissioned ministers to be involved in a curriculum that extends theological education by using covenant groups and mentoring to support the practice and work of their ministry as servant leaders, to contemplate the grounding of ordained ministry, and to understand covenant ministry in the life of the conference. (§326, 2004 *Book of Discipline*)

## Group Support and Accountability

Jesus created community. “Come and follow me” was an invitation to enter a formational relationship with him in partnership with others who were also seeking to learn and live his way. Discipleship was a group experience in which individuals shared their hopes, questions, experiences, accomplishments, and challenges. They prayed, ate, and learned together. With their peers, the disciples witnessed the amazing transforming power of the gospel. When all appeared lost, they reassembled to seek comfort and strength in their group covenant.

The early church formed around this group identity. Acts of the Apostles describes a period of amazing growth empowered by the Holy Spirit, during which Christians distinguished themselves from the predominant culture by their commitment to love and care for each other. Part of that care included holding each other accountable for belief and practice in order to both follow Christ faithfully and survive in a hostile world.

When John Wesley sought to reform and revitalize his faith culture, he incorporated these principles of support and accountability into the revival. The movement was organized into a system which formed and nurtured relationships on several levels. In the Societies, bands and classes, new converts were welcomed, taught the means of grace, and practiced the disciplines of the covenant community.

The various conferences within The United Methodist Church are a derivative of its Wesleyan roots. As the movement became a denomination, though, the process of institutionalization caused many changes. The principles of support and accountability became less relational and more structural. Entry into pastoral ministry, for example, became a process of credentialing and certification instead of commitment to a shared covenant.

The challenges of ministry in postmodern culture have resulted in a renewal of emphasis on the relational nature of the faith community. Small groups are an important and effective strategy in programmatic and organizational life. The most effective of these groups include forms of support and accountability. Consequently, an intentional experience of covenant group life has been included in the Professional Ministry Preparation Process.

## Standards

The following guidelines are suggested for development of a formal, written statement to provide structure and direction for covenant groups. Without exception, all participants must sign the covenant.

## Clear Focus

Even though the purpose for a group of commissioned clergy is determined by the board of ordained ministry, each group will articulate its own understanding of that purpose in the context of covenant ministry.

## Configuration and Lifespan

Annual conferences must decide how covenant groups will be organized and the time parameters of their existence. Will each class of commissioned clergy form a group (or groups)



in which they will participate for the entire period of probation? If so, what alternative will be developed for those whose probationary years last beyond others in their class? Conferences may choose to configure new groups each year when there are limited numbers of participants or concerns about distance and travel times.

### **Assumption of Confidentiality**

The definition and expectations are stated concerning confidentiality in regard to matters shared within the group. Reporting will also be understood and done in a way that does not violate the confidentiality of group members.

### **Spiritual Formation in the Group**

Group prayer, prayer partnerships, devotion, worship, and other ritual practices of the group are specified. A facilitator will help the group discuss and determine these practices, not determine them for the group.

### **Frequency and Length of Meetings**

The frequency and length of meetings will vary, depending on geography, ministry settings, and other conditions. In districts or annual conferences where group members have to travel long distances, the group may decide to meet less often for extended time periods. Although face-to-face sessions are preferred, in extreme circumstances groups may design alternative means of communication via telephone, e-mail, or surface mail.

### **Meeting Style**

In determining the style of meetings, members should consider questions such as the following: What style does the group prefer? Will members participate only through group discussion or will role-play and other processes also be used?

### **Group Expectations**

The covenant must clearly state the group's expectations of each participant and of the mentor-facilitator. These may include:

- attendance guidelines
- expectations for leadership, preparation, and participation in the group
- assignment of responsibility for session preparations
- worship design and leadership
- shared responsibility for building relationships
- an accountability process to keep the group on task.

### **Role of a Facilitator**

Conferences may choose to provide a group facilitator, whose primary responsibility is creation of a safe place for the members of the group. In such cases, a positive group process requires that the facilitator mentor be familiar and comfortable with group processes and be clear about his or her role in these processes. The facilitator does not function in a fix-it role or as an expert in pastoral ministry.

Annual conferences are encouraged to provide special training for facilitators. Consultative support can also be used to help facilitators monitor their functioning in the group, review their usage of group process, and obtain additional resources for effective leadership. The absence of such support may lead to situations harmful to facilitators and the group. Support arrangements must be shared with the group and the meaning of confidentiality clearly defined in both the support and group relationships.

### **Evaluation and Reporting**

What feedback on process is expected? Without breaking confidentiality concerning content,

should the group prepare a report about its life together, or is reporting the responsibility of individual members? In either case, guidelines for content and format should be specified by the board of ordained ministry. Who will evaluate facilitators and how will they be evaluated?

## Models

Covenant groups for commissioned clergy may have many forms. Participants may gather for Bible study, support, devotion, prayer, discussion of ministry issues, personal growth or a combination of purposes. Conferences are free to develop any format, keeping in mind that the principles underlying this aspect of professional ministry preparation are support and accountability.

## A Recommendation: Covenant Discipleship Groups

The Ministry Preparation Resource Team recommends boards of ordained ministry consider adapting Covenant Discipleship Groups as the model for professional ministry preparation. Covenant Discipleship is a small group process developed by the General Board of Discipleship as an intentional approach to spiritual formation, using support and accountability models firmly rooted in United Methodist tradition.

Two primary resources on Covenant Discipleship Groups published by Discipleship Resources are available from Cokesbury. In *Accountable Discipleship: Living in God's Household* (Nashville: Discipleship Resources, 2000), Steven Manskar presents the biblical and historical context for contemporary expressions of this aspect of our Wesleyan heritage. Gayle Turner Watson's *Guide for Covenant Discipleship Groups* (Nashville: Discipleship Resources, 2000) is a manual for those involved in establishing groups.

Covenant Discipleship Groups are formed by small groups of persons (five to seven is recommended) who develop a covenant intended to deepen their relationship with Christ. The primary guide for the covenant is the General Rule of Discipleship, a summary of John Wesley's General Rules:

- to witness to Jesus Christ in the world, and to follow his teachings
- through acts of compassion, justice, worship, and devotion, under the guidance of the Holy Spirit. (Manskar, p. 26)

Participants work through a consensual process to write and agree upon clauses expressing their commitment to regular acts of compassion, justice, worship, and devotion. In addition, they compose a preamble and conclusion which state the nature and purpose of their covenant, affirms their shared faith in Christ, and declares their dependence upon grace.

After adopting their covenant, group members meet periodically for support and accountability. While the standard practice of covenant disciple groups is to meet weekly for one hour, the model is easily adapted to the professional ministry preparation process. One group member leads in a question/answer process of self-reporting on accomplishment of the clauses since the last meeting. Leadership is rotated among all members of the group. Meetings often begin and/or end with prayer and may include time to share joys and concerns. The focus of the gathering, though, is the covenant.

The Ministry Preparation Resource Team recommends covenant discipleship groups for the following reasons:

- They are faithful to the Wesleyan principles of building community through support and accountability.
- They intentionally address the practice of spiritual formation.
- The experience of Covenant Discipleship Groups during probation is an opportunity to learn a model which can be practiced by interested and committed persons in any size or style of congregation.
- As more clergy participate in these groups, the dynamics of the community of clergy



will change in positive ways. Mutual accountability will replace judgmental evaluation. Spiritual formation will become more of a lifestyle than part of the job description. Connection will become more important than competition. We will build a higher level of trust.

Members of the Ministry Preparation Resource Team are prepared to introduce covenant discipleship groups to annual conference leaders responsible for covenant group development and help them adapt the model to their own culture and circumstances.

### **Covenant Groups for Clergy in Extension Ministries (Elders) and Appointments Beyond the Local Church (Deacons)**

Covenant group participation for commissioned ministers appointed to extension ministries or service settings may require adaptation in order to address each unique situation. For those serving outside the conference, the primary concern is finding or creating a group in which to participate. This may be accomplished by connecting with an existing group in one's location or forming a group which will meet the expectations of the board of ordained ministry. In the case of those seeking deacon's orders and others in non-congregational service settings, the challenge may be to accommodate the demands of their work schedules. Conference leaders are encouraged to creatively seek solutions which take into account the needs and circumstances of all parties.

### **Covenant Groups for Local Pastors**

Although new local pastors are not required by *The Discipline* to take part in covenant groups, annual conferences may develop or adapt models for them and require their participation. Such groups can be an effective strategy in welcoming and including local pastors into the community of clergy. Indeed, there may be advantages to considering the development of combined groups including local pastors and commissioned clergy, especially in conferences with small numbers of either or both.

When designing covenant groups for local pastors, leaders should consider their wide variety of categories and circumstances.

# Chapter 6: Supervision

The specialized service of probationary members shall be evaluated by the district superintendent and the board of ordained ministry in terms of the probationary member's ability to express and give leadership in servant ministry. (§326, *2004 Book of Discipline*)

**Eligibility and Rights of Probationary Membership**—Probationary members are on trial in preparation for membership in full connection in the annual conference as deacons or elders. They are on probation as to character, servant leadership, and effectiveness in ministry. The annual conference, through the clergy session, has jurisdiction over probationary members. Annually, the board of ordained ministry shall review and evaluate their relationship and make recommendation to the clergy members in full connection regarding their continuance. (§327, *2004 Book of Discipline*)

Probationary members shall be supervised by the district superintendent under whom they are appointed. (§327.4, *2004 Book of Discipline*)

All clergy are supervised and held accountable for their conduct, ethical behavior, understanding, and effectiveness in ministry. It is essential that during the ministry preparation process, probationers and local pastors are clear concerning the criteria for assessment and receive supervision that enables them to develop the skills and habits that will sustain them in ministry.

## Supervision of Probationary Members

Supervision of the probationary member is the responsibility of the board of ordained ministry and the district superintendent. In this joint responsibility, it is essential that the board of ordained ministry and the cabinet have conversation and establish clear expectations of probationary members. These expectations should be written and given to probationary members in order that everyone has the same understanding of expected behaviors and participation in the probationary process. This document should include the specific criteria for the assessment of the ministry of the probationer to be used by the board of ordained ministry and the district superintendent. At the conclusion of the probationary period, the district superintendent and board of ordained ministry must determine if the probationary member is effective in ministry. The annual conference definition of effectiveness in ministry should also be given to the probationer to ensure an understanding of the criteria by which they will be assessed.

## The Role of the Board of Ordained Ministry

The Ministry Preparation Team makes the following recommendations to boards of ordained ministry as they carry out supervision of probationary members.

- Develop guidelines outlining the probationary process and expectations of the probationer, board of ordained ministry and district superintendent. These can then be given to probationary members and district superintendents who will have the same information and clear understandings of expected process and outcomes. This could be given in an orientation session for probationers and district superintendents to ensure that all have a common understanding of the process.
- Set up a supervision program that will enable the board of ordained ministry to have full information of the probationer and their ministry setting.
- An annual review of the probationer should be part of the process in order to make a recommendation to the clergy session for continuance in the process. This might include reports from the probationer, mentor and district superintendent and an interview or check in.

- Develop teams from the board of ordained ministry to conduct visits to the ministry sites of probationers. These might include the lay members of the board of ordained ministry who could be available to conduct visits to experience the leadership of the probationer in a worship experience, hear them preach or when the probationer is in an extension ministry or appointment beyond the local church to observe them in their ministry leadership.

## The Role of the District Superintendent

The district superintendent can play a vital role in the growth of the probationer by ensuring they have full knowledge of the probationer's ministry setting and observing the probationer's leadership in ministry. Regular meetings with the probationers in the district will enhance communication and build relationships that will enable leadership development. Supervision entails holding probationers accountable for participation in the probationary process and district events in addition to responsibilities in their ministry setting. The Ministry Preparation Team makes the following recommendations to district superintendents for supervision of probationary members.

- Visit probationers in the district in their ministry setting and observe them in their leadership role. This visit should be in addition to the charge conference in order to gain an understanding of their leadership style and their relationship to those with whom they serve. Hear the probationer preach or in the case of those in extension ministry or serving beyond the local church observe their ministry.
- Meet with the probationer one-on-one annually for goal setting assessing the past year and how the goals were met. Hear issues facing the probationer and make recommendations when necessary. Share what your assessment of their ministry is and what will be in your report to the board of ordained ministry.
- Hold group meetings with all the probationers in the district and take time to train when there are opportunities. Be clear about expectations, i.e., charge conference reports.
- Before making the final probationary report to the board of ordained ministry, meet with the probationer and be clear about your assessment of their ministry and your recommendation.

## Supervision of Local Pastors

A local pastor shall be under the supervision of a district superintendent . . . , (§316.4, *2004 Book of Discipline*)

Upon completing each year's education and other qualifications, a local pastor who is not a probationary member may be recommended for continuance by the district committee on ordained ministry. The clergy members in full connection of the annual conference may approve continuance of a local pastor after reference to, and recommendation by, its board of ordained ministry. (§319.2, *2004 Book of Discipline*)

Supervision of local pastors is the responsibility of the district superintendent and the district committee on ordained ministry. The conference board of ordained ministry votes on the continuance of local pastors after receiving the recommendations from the district committees on ordained ministry. Their recommendation is subsequently sent to the clergy session of the annual conference.

District superintendents supervise the local pastors and appoint their mentors.

The district superintendent also holds the local pastors accountable for meeting the requirements as a local pastor. The Ministry Preparation Resource Team makes the following recommendations for the supervision of local pastors.

## **The Role of the District Superintendent**

Meet with local pastors one-on-one annually for goal setting and assessment of the past year's goals. This should include a review of course of study work during the past year and plans for completion.

- Assign mentors to local pastors for regular meetings.
- Visit the local pastor in their ministry setting observing their leadership role and style. This visit should be in addition to a charge conference visit.
- Hold group meetings with local pastors addressing issues and being clear on expectations for assessment of their ministry.
- Make recommendation to the district committee on ordained ministry for the continuance of local pastors. Recommendation should be part of the discussion with the local pastor during the one-on-one meeting.

## **The Role of the District Committee on Ordained Ministry**

- Meet with local pastors annually reviewing their progress in the course of study.
- Receive recommendation from district superintendent for continuance of local pastor.
- Determine recommendation to the board of ordained ministry for continuance of the local pastor.
- Be clear concerning requirements and expectations for the ministry of the local pastor.

Supervision should be a positive contributor to the development of the probationer and local pastor and studies indicate when there is trust and open communication between the parties involved the relationship has the strongest impact.



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### **Our Mission**

The General Board of Higher Education and Ministry leads and serves The United Methodist Church in the recruitment, preparation, nurture, education, and support of Christian leaders—lay and clergy—for the work of making disciples of Jesus Christ for the transformation of the world.

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