

EFFECTIVE LEADERSHIP AND HEALTHY PASTORAL RELATIONSHIPS REPORT TO THE EXECUTIVE OF THE GENERAL COUNCIL (NOVEMBER 2011)

Motion

The Permanent Committee proposes that the Executive of the General Council:

- 1) Receive this report;
- 2) Direct the General Secretary to:
 - a. Initiate consultations with the wider church on:
 - i. The wisdom and viability of the proposed model
 - ii. And, avenues of funding;
 - b. Prepare draft Manual provisions to support the direction of the proposed model;
 - c. Report back on the March 2012 meeting of the Executive of the General Council with detailed proposals for the consideration of the 41st General Council.

Summary

In order to redirect valuable leadership in both the Presbytery and the Pastoral Charge to focus on nurturing and strengthening the mission life of congregations and other local missions while also enhancing the effectiveness of ministry personnel and the health of pastoral relationships it is proposed that:

- the responsibility for the implementation of pastoral relations policies related to mission, collegiality and pastoral care of ministers be located with the Presbytery;
- the responsibility for the implementation of pastoral relations policies related to the credentials of ministry personnel, employment standards and the initiation or ending of pastoral relationships be located with the Conference.
- the processes of pastoral relations and of oversight and discipline of ministry personnel be managed by staff located at the Conference;
- the processes for nurturing effective leadership and healthy pastoral relationships be simplified and designed to allow them to respond to the unique geographic, cultural, and linguistic characteristics of local ministries.

Background

Proposals (GS3, GS23, BC4, LON3, TOR4, BC, MNWO1 and GC94) to the 39th General Council (2006) called for evaluations of oversight, discipline, and pastoral relations processes. In November, 2007, the Executive of the General Council reviewed the “Simplifying Policies and Procedures Related to Pastoral Relations Report and Resolutions” to 38th General Council (2003). In this report it was stated that, “*Pastoral Relations, Oversight and Ministry Vocation presbytery work is often difficult, draining, and overwhelming.*” The Executive affirmed the intent, and referred to the General Secretary for consideration in ongoing work, that, “*complex pastoral relations policy implementation be lodged with Conference and General Council staff positions freeing pastoral charges and presbyteries to nurture strong pastoral relations.*”

The General Secretary’s report “Planning for a Future Grounded in Faith and Action” and the subsequent motion of the Executive of the General Council (May, 2010) directed that proposals be developed to simplify pastoral relations processes and shift responsibilities for some or all pastoral relations from Presbyteries to Conferences. The report envisioned Presbyteries being

freed from the administrative burden of increasingly complex human resource and regulatory work so that its leadership can focus more on supporting local ministries in their mission and ministry and foster a sense of greater support and collegiality among ministry personnel. It also imagined that simplified processes could encourage a greater range of ministry possibilities by being more open and adaptable. It was hoped that with *“a broader definition of ministry, there would be greater scope for congregations to transform into less formal kinds of faith communities and for new and less structured faith communities to be born.”*

The Permanent Committee Ministry and Employment Policies and Services undertook numerous initiatives to assess current practices and requirements, to consider best practices in other churches, professional and not for profit organizations, and to develop proposals for consideration. These initiatives include:

- the Isolation in Ministry Steering Group and survey (2005);
- the Working Group on Isolation in Ministry (2008);
- the Task Group on Demographics of Ministry Personnel (2008);
- the Oversight and Discipline of Ministry Personnel Steering Group (2008);
- the Pastoral Relations Policy Review Steering Group (2009);
- the Effective Leadership and Healthy Pastoral Relationships Collaborative Research Project and survey (2010).

Rationale

Ministry and mission are actively engaged throughout The United Church of Canada, whether one is serving at the Pastoral Charge, the Presbytery, the Conference or the General Council, at the shelter or the hospital, with global partners, ecumenical partners, or community partners. We work for complex systemic change and we work for simple moments of grace. We pray and we praise.

In 1925 this new United Church of Canada stated its conviction that: *“we receive it as the will of Christ that His Church on earth should exist as a visible and sacred brotherhood ... for the public worship of God, for the administration of the sacraments, for the upbuilding of the saints, and for the universal propagation of the Gospel”* (Basis of Union, Articles of Faith XV Of the Church). In *A Song of Faith* (39th General Council 2006) the United Church sings of the church’s purpose:

*“faith nurtured and hearts comforted,
gifts shared for the good of all,
resistance to the forces that exploit and marginalize,
fierce love in the face of violence, human dignity defended,
members of a community held and inspired by God, corrected and comforted,
instrument of the loving Spirit of Christ,
creation’s mending.”*

While mission and ministry take many forms and are engaged in many places, the primary place of mission and ministry is our local congregations. Here in more than 3,200 churches, large and small, lives are daily transformed for a moment, a month or a lifetime. At times of birth and death, of trial and triumph and every time in between, members and ministers witness to a Presence that is eternal, a Promise that is steadfast, and a Hope that gives life. Congregations and

other local ministries are not dependent upon paid accountable ministry personnel* but it is in our tradition that we do call up individuals to vocations of ministry leadership. The 40th General Council (2009) adopted the “Statement on Paid Accountable Ministry” in which it affirmed that “*While all members share in Christ’s ministry, the church from its earliest days has recognized that God calls some from within the community through specific gifts to ordered expressions of ministry.*” The Statement goes on to acknowledge that “*The church also has recognized the emergence of lay expressions of ministry in local and time-limited contexts, and identifies them as designated lay ministry.*”

Effective paid accountable leadership and healthy pastoral relationships among ministry personnel, the local ministry and the governing bodies† of the Church are critical components to the faithful and vital fulfillment of God’s mission that we sing of in The United Church of Canada. It is crucial that the policies and procedures supporting the initiation of these relationships, the on-going support and accountability of them, and the conclusion of them be flexible and transparent. It is also important that they be responsive to particular contexts of region and culture. The 2,400 ministers serving in active calls and appointments across the church are among The United Church of Canada’s greatest assets in responding to the call to be the Church:

*to celebrate God’s presence,
to live with respect in creation,
to love and serve others, to seek justice and resist evil,
to proclaim Jesus, crucified and risen, our judge and our hope.
(A New Creed 1968, rv 1995)*

The collaborative research project concluded that ensuring the health of these relationships is critical to enhancing the health of ministry personnel and their practice of ministry. The health of ministry personnel and their practice of ministry directly impact the health and the effectiveness of the local congregation and its mission. Congregations are better equipped to celebrate, live, love, seek and proclaim. Strengthen the health of ministry personnel and the relationships between them, the congregation and the governing bodies of the church and the ministry of The United Church of Canada is strengthened. With twice as many ministry personnel saying that they feel more accountable to the congregation(s) that they serve than to the wider church, ensuring the health of pastoral charges and the relationships between pastoral charges and ministry personnel would contribute significantly to the workplace health of ministry personnel

This report addresses only issues of concern to effective and healthy paid accountable ministry relationships. In doing so it does not in any sense mean to reduce the significance or value of lay ministry, lay leadership, or their valued call to ministry. This report also recognizes that “*While there may be elements similar to employment, the essential nature of the relationship is a covenant*” with the local ministry, the governing bodies of the church, and God” (Statement on Paid Accountable Ministry 2009). Recognizing that paid accountable ministry is both a vocation

* “Paid accountable ministry personnel” refers to ordained, diaconal and designated lay ministers called or appointed to a paid ministry position in a local ministry.

† “Governing bodies” refer to the Courts of the church: the local church board, council, or session, the presbytery, Conference, and General Council.

and a profession, the church holds a commitment to engage ministry personnel and local ministries with policies that are fair, just and consistently applied (Permanent Committee on Ministry and Employment Policies and Services Guiding Theological Perspectives).

The present model

Currently the Presbytery plays the pivotal role in initiating, supporting and overseeing the pastoral relationship. The Presbytery initiates and provides leadership for Joint Needs Assessments and Joint Searches (the “Joint” in both referring to a joint endeavour by Presbytery and the local ministry). It declares the “vacancy,” approves the call or appointment, and provides pastoral oversight of the on-going ministry and oversight and discipline of ministry personnel. It also has responsibilities in both formal and informal conflict resolution processes. Largely Presbyteries do not have paid accountable staff and this work is undertaken by lay leaders from the local congregations and by ministry personnel called or appointed within the boundaries of the Presbytery. Collaborative research project respondents generally felt that reliance on volunteer effort is hampering the Church’s ability to effectively manage pastoral relations. Often volunteers do not have the full expertise required to fulfill their duties well. The processes associated with pastoral relations require significant volunteer time and are affected by volunteer shortages and burnout. Increasingly, the more complex aspects of formal processes have been delegated by presbyteries to the Conferences. British Columbia, Alberta and Northwest, and Toronto Conferences have established regionally deployed staff with varying degrees of pastoral relations and personnel responsibilities.

Local governing bodies (the Church Board, Council, Session), often through a Ministry and Personnel Committee, exercise a significant functional role in the setting of goals and priorities, and practical on-the-ground support and oversight of the minister's daily practice of ministry. In the Collaborative Research Project, Ministry and Personnel Committee skill and knowledge were identified as leading pastoral relations concerns.

Concerns with the present model

The proposals and petitions to successive General Councils, the responses to the simplification of processes project, and the findings of the collaborative research project all indicate that this model is increasingly experienced as unsustainable and unsuitable.

In the collaborative research project respondents, lay and ordered, reported that, “*there is too much policy and process required for managing pastoral relations, and that the policies and processes are generally applied too rigidly.*” Ineffective communication with ministry personnel regarding performance as well as with poor pastoral oversight processes, were the primary concerns related to pastoral relations. It was the opinion that “*there is a general need for more professional-level support to assist pastoral charges with ministerial compensation and performance management.*” Ethno-culturally specific and linguistic minority communities within the Church agree that pastoral relations policies and processes designed for the Anglo North American context often do not take unique circumstances into account. And the vast geography of other contexts often mean policies and procedures cannot be fulfilled, further isolating ministry personnel in those contexts. The predominance of these concerns lends support for implementing structures that can provide professional-level support to pastoral charges regarding ministerial performance reviews and oversight.

Presbyteries report that they are increasingly finding it difficult to assemble the volunteer and ministry personnel resources to staff the current processes. Secular employment standards and growing public expectations for accountability, timeliness, and transparency of processes often exceed the capacity of presbyteries to meet and congregations and other local ministries to observe. Triennial oversight of congregations is often not happening, or judged not to be happening effectively. 55% of collaborative research project respondents' congregations were visited by a Pastoral Oversight Committee in the last three years. When asked what the primary goals of oversight visits should be, the top responses were assessing the health of pastoral charges (63%) and providing counsel for pastoral charges on matters regarding congregational life (48%), and building connections between pastoral charges and wider church. Regular reviews and assessments with ministry personnel are often not happening or not happening effectively.

Collaborative research project respondents view the biggest concerns regarding pastoral relations as ineffective communication with ministry personnel regarding performance (21%), followed closely by poor pastoral charge oversight processes (16%). Conflicts and conflicting expectations often escalate into processes that are not undertaken in timely fashions or with consistency of results. Ministry personnel called on to assess, oversee, and discipline colleagues are put in positions of conflict of interest which undermine collegiality and cooperation. In the collaborative research project, among ministry personnel of all types, ages, and years of service, peers are seen as a primary source of support when dealing with the stresses and difficulties of ministry, and collegial conversations about the job is significantly rated as the primary kind of job-related support that ministry personnel most often seek. This, combined with the sense that ministry personnel who serve on Presbytery committees are faced with a dilemma in needing to both support and discipline their peers, suggests that there would be value in shifting the focus of Presbytery to serve as a source of support to ministry personnel, allowing a different court of the church to manage oversight and discipline.

Responses to all consultation expressed fatigue at the volunteer intensiveness of the processes and frustration that the processes are often not adequately supported with experience and with professional competence. Critical energies are redirected from local ministries into administrative processes, frequently robbing the church of vital spirit.

Conclusions about the present model

It is the conclusion of the Permanent Committee that volunteer-based support and oversight of pastoral relationship and of ministry personnel through the Presbytery or congregation is not adequate to meet the standards of due diligence, consistency, justice and accountability that are required today. Nor are they sustainable into the future. The current model cannot be tweaked to meet these responsibilities.

It is also the conclusion of the Permanent Committee that the work of covenant and relationship building among the local ministry, the governing bodies of the church and the ministry personnel, which are so critical to effective leadership and healthy pastoral relationships, is not best done through the implementation of operational or regulatory processes. The current model discourages collegiality and drains people of time and resources to devote to this relationship

building. There was universal agreement in the collaborative research project that ministers need to build stronger collegial relationships with each other.

All this said, in good faith and with much competence, many lay and ordered leaders have resourced, and continue to resource, our processes and have faithfully supported local ministries and ministry personnel through transitions, challenges and conflicts. The cost, however, to time, energy and spirit, while difficult to measure in dollars, is very high. The common consensus in collaborative research project is that this model is not sustainable into the future.

Proposed new model

It is proposed that:

Congregations and other local ministries:

Congregations and other local ministries continue to be the primary places where the ministry of the United Church of Canada is lived out. Supported by the Presbytery, they would discern their mission (mission statement), determine the nature of leadership required, and set ministry priorities (position descriptions, work plans, etc.) for any ministry personnel in the pastoral relationship.

Presbyteries:

Presbyteries continue to be the primary meeting place for congregations and local ministries. They would provide support for congregations in defining their mission, celebrate the covenant established among the pastoral charge, the governing bodies of the church, the ministry personnel and God, provide pastoral care for ministry personnel and their families, and nurture collegiality among ministry personnel, both active and retired.

Conferences:

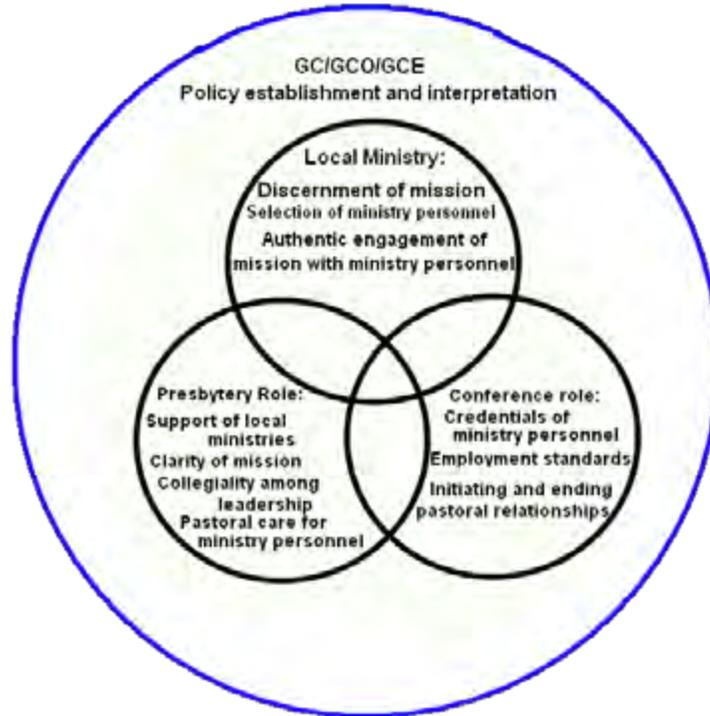
The Conferences assume responsibility for the management and implementation of pastoral relations policy and would have professional staff to do this work. This would include regular assessments of ministry personnel serving a congregation or local ministry, ensuring that the minister retains a sense of call to the congregation, continues to develop the skills and gifts needed to provide leadership for the congregation's mission, is meeting the Ethical Standards and aspiring to the Standards of Practice, and retaining an appropriate balance between vocational and personal life. The Conference, through its Executive, Sub-Executive or Commission established by it, would also assume responsibility for all formal investigative or disciplinary processes related to the pastoral charge, the pastoral relationship, or the conduct of the minister.

General Council:

The General Council and its Executive continue to be responsible for the establishment and interpretation of pastoral relations and oversight and discipline policies.

By consolidating the primary responsibilities for the implementation of pastoral relations and oversight and discipline policies in a single court, the Conference, and by appropriately staffing it to manage the processes, it is envisioned that a new level of quality and consistency of oversight and of formal review can be accomplished. This will allow the church to better meet the standards of due diligence, justice and accountability that are required today, strengthen the

effectiveness of paid accountable ministry personnel and the health of pastoral relationships. It is also envisioned this model would free ministry personnel and lay leaders for the more effective roles of building trusting communities and respectful collegial relationships within the Presbytery.



It is proposed that this model be further tested with church constituencies for its wisdom, viability, and sustainability. With input from this consultation, a final report with proposed *Manual* provisions would be presented to the March 2012 meeting of the Executive of the General Council for recommendation to the 41st General Council.

Much work has already been done by the steering groups of the Permanent Committee, based on their research and surveys, to develop more detailed procedural policies. It is proposed that these procedural policies, which would operationalize the broader *Manual* based policies, would be approved by the Executive of the General Council subsequent to the meeting of the 41st Council. Rather than being bound to a three year change cycle related to General Councils, these procedures could be amended, withdrawn, or expanded in a six month cycle related to the Executive meetings. This would ensure that the practical aspects of the policies are more readily responsive to changing contexts and emerging ministry opportunities and that they can be phased in as Conferences are ready to assume the new responsibilities.

What might this model look like practically on the ground?

Developing the procedural aspects of the model would require time and consultation, testing and adaptation. Consideration has, however, been given in a preliminary way to what this model might look like on the ground.

In the initiation of a pastoral relationship:

- the Conference, through personnel staff, would provide support to local ministries in determining ministry personnel requirements, developing ministry personnel position descriptions, and searching and selecting ministry personnel;
- when an appropriate candidate has been identified by the local search committee and approved by a meeting of the pastoral charge's members, the candidate and the terms of the call, appointment or placement would be recommended to the Conference Settlement (Placement) Committee;
- the Conference, through the Conference Settlement (Placement) Committee, would review terms and conditions of all placements before determining whether or not to confirm the recommendation of the congregation or local ministry for a particular placement;
- the celebration of the covenant among the local ministry, the ministry personnel, the governing bodies of the church, and God would be arranged by the Presbytery;
- through the Conference and the General Council Offices, a programme of intentional support and mentoring of ministry personnel in their first five years of a placement would be made available.

In the on-going oversight and support of a pastoral relationship:

- the Presbytery would serve as a forum for the identification and celebration of congregations' missions, provide pastoral and spiritual care to ministry personnel and their families, and foster collegiality among ministry personnel, both active and retired;
- the Presbytery would undertake regular assessments with local congregations and ministries to ensure that the expressions of mission and ministry are clear, relevant and vital;
- the Conference, through the personnel staff, would support Presbyteries in the development of practices and the management of resources to provide pastoral and spiritual care to its active and retired ministry personnel and their families.

In the oversight of congregations or other local ministries in conflict:

- the congregation's governing body would address the earliest stages of concern about the health of the ministry or conflict in the pastoral relationship;
- if the governing body cannot address the concerns to its own satisfaction or to the satisfaction of those involved in a conflict, the Conference would be responsible for responding;

- the Conference personnel staff would initiate any consultative or informal processes of assessment that are deemed appropriate by him or her and oversee any remedies that are mutually agreed upon;
- when a review, assessment, or remedy is not mutually agreed to, the Conference personnel staff would recommend formal courses of action to the Conference Executive, its Sub-Executive or a Commission that it has appointed.

In the discipline of ministry personnel:

- the Conference personnel staff would initiate any consultative or informal processes of assessment that are deemed appropriate by him or her and any remedies that are mutually agreed upon;
- when a review, assessment, or remedy is not mutually agreed to, the Conference personnel staff would recommend formal courses of action to the Conference Executive, its Sub- Executive or a Commission that it has appointed;
- all formal investigations would be conducted by a trained investigator who is not associated with the Presbytery where the pastoral charge or minister is.

In the conclusion of a relationship between a minister and a local ministry:

- the Presbytery would provide support and encouragement to the congregation or other local ministry during the transition period between pastoral appointments or calls;
- the Conference personnel staff would provide support and encouragement to the ministry personnel during the transition between pastoral appointments or calls;
- the Conference Executive or its Sub-executive, after formal due processes, would have jurisdiction over decisions to terminate a pastoral relationship or to place a ministry personnel on the Discontinued Service List (Voluntary and Disciplinary).

Opportunities, implications, costs, and funding

This proposal represents substantive change not just to the jurisdiction over and implementation of pastoral relations policy and processes but also to the very structure of the United Church. While different than our current practice which is consistent with a Presbyterian model, the direction of this proposal is consistent with the ecclesiology of our Methodist ancestry. This touches on the larger conversations about our denominational identity, allocation of resources, and understandings of power, authority and accountability.

It is concluded by the Permanent Committee, however, that these proposals would significantly enhance both the effectiveness of our paid accountable leadership and the health of our pastoral relationships.

By moving the authority over the implementation of the informal and consultative processes of pastoral relations, and the formal processes of oversight and discipline to staff resourced positions at the Conference, an enormous amount of lay and ministry personnel time currently consumed by the processes would be released into the Presbytery and congregation. With these processes managed by staff who is professionally trained and who is skilled in conflict intervention and resolution, there will be a consistency, quality, and timeliness that cannot be provided in our volunteer-based practices. Search and selection processes will proceed more efficiently, and with professional support. Regular assessment and review of ministry personnel by trained staff will better ensure ministry personnel are supported in their vocational calling and accountable to that calling. Presbyteries will have a tremendous opportunity opened up to truly embrace pastoral care, collegiality and shared mission and ministry. Expanded learning circles, creative processes of spiritual care, and co-operative mission endeavours are just three possibilities. In many ways, this model allows the Presbytery to fulfill traditional purposes that have often been set aside because of the increasing requirements of oversight, disciple, and pastoral relations.

A primary consideration is the financial cost of this proposed model. It is estimated that it would require a personnel staff person for every seventy-five pastoral charges, or thirty personnel staff deployed regionally through the Conferences. There is currently the equivalent of at least one personnel minister in each Conference. It is proposed that that role be evolved into this new personnel role and augmented by seventeen new positions. At an approximate annual salary and benefits cost of \$70,500, these additional positions would cost \$1.2 million dollars (the total cost, including the thirteen positions currently funded, represent less than 2% of the annual payroll for ministry personnel). There would also be costs associated with office space, support staff and travel.

The present model is not without costs, though mostly they are dispersed and most are not financially countable. It is not possible to put dollar values on the number of volunteer hours invested in our current pastoral relations and oversight practices. The Presbytery, whose membership is drawn from the local ministries and ministry personnel, currently expends extensive amounts of “volunteer” time to “staff” our processes. For example, it is not unreasonable that a search process in a congregation would involve two presbyters in ten two to three hour meetings over several weeks or months. Multiply this by five times for the typical number of searches annually in a presbytery by the eighty-five presbyteries and this one process alone consumes around 25,000 hours a year. This is time not available for other mission-focused service.

Other dispersed and non-financial costs that could be reduced with professional staff supporting pastoral relations include: reduced member participation and contribution after a minister leaves and before a new permanent minister can be called or appointed; volunteer time for and the delay in moving to a search caused by joint needs assessments; disruption to soul and community when conflict is not adequately managed and resolved; lost spirit and vitality when ministers are feeling isolated or not supported; lack of collegial relationship within which ministers are nurtured and growth is sustained; and costs in dollars and spirit in delayed and protracted formal proceedings.

It is difficult to quantitatively measure many of the costs identified above and even more difficult to collect the savings to fund a new model. Several options for funding this model have been identified by the Permanent Committee. Other options will be sought in the course of broad consultation across the church as this proposal is considered.

One option that has been identified is the institution of a payroll-type assessment of local ministry units. It would amount to approximately \$50/month/ local ministry. A variation on this would be to institute a single payroll fee which would cover all administrative costs[‡] associated with a paid accountable position. Neither would likely be very popular and places the financial burden explicitly and directly upon the congregation.

Another option is the ear-marking of a specific portion of the current Conference grant from the General Council budget. Presently the amount is intended to provide for “core functions” expected of the Conferences. This option would require a review of what is considered “core,” giving priority to the personnel support role consistent with the new responsibility.

A third option is a reallocation of the current General Council Office budget to provide the additional funds. This would require significant reconfiguration of the current funding priorities and reduction or elimination of some existing key programmes and services at the General Council Office.

Over time the number of costly formal actions would likely be significantly reduced by the early professional intervention in emerging conflicts and unhealthy relationships and the strengthening of ministry personnel through effective on-going support and evaluation. This saving, however, would not be immediate and cannot be readily expressed on a budget sheet. It would likely be significant in dollars, however, not to mention in spirit and vitality.

Conclusion

There has been considerable expression of frustration and fatigue with our current policies and practices for the initiation, support, accountability, and conclusion of paid accountable ministries and pastoral relationships. The direction of the Executive in “Planning for a Future Grounded in Faith and Action” to move some or all of the pastoral relations practices to staffed positions at the Conferences was received with enthusiasm and a cautious optimism.

The Working Group on Isolation in Ministry recognized “*the Church’s need to be vigilant about caring for its ordained and commissioned members of the Order of Ministry and for those who have been designated as its lay ministers.*” They concluded that “*this need is on-going.*” They went on to press an urgency to this work “*because the health and well-being of our ministry personnel will continue to be at risk if the ongoing issues of isolation are not effectively addressed. Where ministry personnel are at risk or compromised, congregations and their ministries are put at risk and compromised.*” They call the church to commit to the “*vitality of our ministry personnel and to the vitality of The United Church of Canada.*”

[‡] Administrative charges included core group health insurance, restorative care, employer indemnity, short term disability, employee assistance plan, and pastoral charge payroll fee.

All four gospels tell the story of a woman gently bathing Jesus' feet, administering a fragrant, soothing balm. In Luke's and John's telling she wipes his feet dry with her hair. There is not much more intimate than the act she performed out of her love and appreciation for the work Jesus was about. When criticized for wasting the expensive oil used, Jesus, in response, spoke of our duty to care for those who are called and covenanted to carry the message, the mission: "*she has done a beautiful thing ...*" (Mark 14:6, Revised Standard Version).

The Permanent Committee Ministry and Employment Policies and Services senses that there is both the will and the willingness within the church at this time to undertake significant change. This proposal is not a tweaking of the current model nor is it a simple transfer of responsibility and authority. It is an opportunity to truly reflect and create policy and protocols for today's context and for the future. It commends the proposals of this report to the Executive of the General Council.