

Mutual Ministry Review: Celebrate Success-Resolve Challenges

Most of what follows was developed by congregational consultants of the Diocese of Washington, based on original work by The Episcopal Church Foundation, Ms. Sally Bucklee, and the Office of Congregational Development of the National Episcopal Church. It is used with permission.

There is no single way to do mutual ministry review. A simple format highly recommended by the Bishop's Office is included at the end of this document. Further resources and information about mutual ministry can be obtained by contacting the Director of Congregational Development.

What is Mutual Ministry Review, and why should our parish do it? Mutual Ministry Review is a way for every parish to ask, "How are we doing?" It is a time to celebrate what has been done well and to understand what might be done better. As Christian people we must always ask: "What is God calling us to do and to accomplish here in this place?" And then, "How can we best practice this ministry?"

Ministry is the work of the whole people of God, not just of the ordained clergy. Therefore, Mutual Ministry Review is meant to help the entire parish better accomplish God's mission. What is being reviewed is the ministry of laity and clergy working together in the daily life of the community for the glory of God.

Mutual Ministry Review is intended to nurture environments where responsibilities are discussed and reviewed regularly and comfortably. As a result, communities and individuals will understand what is expected of them. Roles will be clarified, and time and energy centered on what is important for the building up of the Body of Christ.

Participants are encouraged to remember that the intent of the Mutual Ministry Review is to improve effective ministry. The focus will be on means of improvement rather than on reasons why something was not done. Within the pastoral context of the review process, the emphasis is on **celebrating the successes and resolving the challenges**. This is sound, healthy stewardship.

Planning A Mutual Ministry Review

I. Deciding where and when to begin

Many believe that the most critical influence on congregational health and vitality is the Vestry/Rector relationship, and that is where Mutual Ministry Review usually begins. Mutual Ministry Reviews work best when they are part of a **regularly scheduled** process of clarifying expectations, responsibilities, and effectiveness. When discussion and feedback are expected as a normal part of life together, the anxiety about such a process is greatly reduced. At all times, prayer and support for everyone involved in the Review is integral to the process. **Avoiding defensiveness, encouraging participation, and setting clear goals** for turning challenges into successes are key factors.

Comprehensive reviews are not helpful when major conflicts are present. Using evaluation as a weapon is never acceptable. When regular assessments are a part of a congregation and rector's life together, strengths and challenges can be identified early and easily. The time to begin a review process is NOT when the relationship is already in trouble. If major tension has developed, conflict resolution or problem solving is called for, not ministry review.

II. Identifying what you want to achieve

A successful Mutual Ministry Review helps both rector and vestry feel affirmed, supported, and encouraged in their ministry and valued as individuals whose efforts and accomplishments are recognized and appreciated. Both personal and organizational problems need to be tactfully but clearly identified and mutually explored to find ways to alleviate the problems.

The vestry and rector should exchange ideas on priorities for continuing personal growth and development in the rector's skills, the vestry's effectiveness, and their mutual effectiveness as a vestry/rector team. A successful review will leave all parties uplifted and energized by a sense of God's presence and action in the process.

III. Clarifying the difference between roles and responsibilities

Although Ministry Review evaluates the performance of priest and vestry, the Rector is the one who is most often reviewed for both responsibilities and roles. Therefore it is important for everyone to understand each and the distinction between the two.

A Rector is also a Priest. "Rector" implies responsibilities and tasks, while "Priest" implies role. Rectoring means doing--planning services, teaching youth, supervising staff. Priesting means Being—one who is a bearer of holy things, prophetic, open, and loving. Rectoring calls up words like professionalism, competence, and performance. Priesting calls up spirituality, faith, and mystery.

Responsibilities:

Preaching
Pastoring
Administering

Role:

Being a spiritual person
Being a sacramental person
Being authentic

Responsibilities: Rectors provide administrative authority, organizational leadership, pastoral care, and guidance toward growth. They are the organization's key for resources, action, and reaction. Their primary vocation is commitment to the organization. The effectiveness of the congregation's total ministry depends to a large extent on what the lay people expect of their rector, how they share the ministry, and how they contribute toward it.

Role: Priests are central by what they symbolize to the congregation, and by the way they represent the congregation to the wider community. They are central and symbolic in the way they express personal faith, care, and commitment, especially when that faith and commitment are visible to other people.

Guidelines for Mutual Ministry Review

1. **Remember you are not in this process alone.** Christ, who is the true head of the church, is our constant companion in the journey. When we take seriously our call as Christians to share in a common ministry, we agree to be open to the leading of God's Spirit. The hard job of evaluation is part of that commitment. As you approach this task, be challenged by the words of Paul to the Corinthians, "Keep alert, stand firm in your faith, be courageous, be strong. Let all that you do be done in love."
2. **Set goals that are limited, specific, measurable, and achievable.** Keep it simple! The more complex an evaluation process becomes, the more likely participation in it will be limited, the process will not be completed, or it will result in a large, detailed report never to be read or heard from again.
3. **Determine the best time to schedule reviews.** Special reviews can be helpful during a priest's first year of service; quarterly conversations with a six-month and one-year check-up with renegotiation can assist the new rector and vestry to keep on track with mutual expectations and goals. A more comprehensive review every four to five years can be valuable.
 Note: Compensation reviews for clergy should not be held in conjunction with mutual ministry reviews. Ministry reviews in the fall and compensation reviews in the spring (or vice versa) can avoid this tension.
4. **A comprehensive review is most helpful when the rector requests it.** Planning the process in such a way that both clergy and vestry contribute to the design leads to ownership by all.
5. **Develop a design that fits your specific parish.** Congregation (size, history, finances, location, theological perspective, etc.) and rector (years of experience, health, gifts, etc.) are so varied, no single plan for review may fit well. A consultant can be helpful in designing and assisting in an appropriate review process.
6. **Be clear from the outset what will happen as a result of this review.** Who will see the findings? How will a report be made to the congregation and others? If changes in job descriptions, the mission statement, or goals are to be made, who will make and approve them? How will those changes be reported and evaluated?
7. **Provide a system for monitoring decisions.** Timelines, measurable goals, strategies and "temperature taking" sessions can all help sustain the learning from the review and assure that the agreed upon changes do occur and continue.
8. **Focus on positives as well as negatives.** Look at strengths and opportunities as well as weaknesses and problems. Stay away from comparisons and focus on individual potential and development. Meanwhile, steer a careful path between two extremes: the "shower of praise" that says only that "everything is going fine, you're wonderful"; and the "shower of complaints" that may hide serious issues under a mass of non-issues.

Helpful Background Information:

Survey results from healthy congregations

In 1995 as part of their wellness initiative, the Episcopal Church Foundation and The Cornerstone Project commissioned consultant Tom Ehrich to interview the Rectors/Vicars and Wardens of 25 Episcopal congregations, ranging in size from 70 to over 3,000 members—all having been defined as reasonably healthy congregations. The following compilations of markers of healthy vestry/rector relationships and new ways to work together are based on the work of Tom Ehrich.

I. Markers of a Healthy Vestry/Rector Relationship

Interviews of Rectors/Vicars and Wardens of vigorous congregations revealed the following characteristics of healthy relationships:

- **The personal health of the individuals** in the relationship is the primary contributor to the health of the relationship. Much less important are factors like organizational models and decision-making norms. Signs of health include personal maturity, the ability to function openly in an ambiguous, stressful and often conflictual environment; spiritual vitality; and emotional stability. Because a consensus-based system is vulnerable to unhealthy personalities, attention is being paid to who gets nominated to the Vestry, and to the emotional and physical health of Rectors.
- Vestry members **take responsibility** for the life of the group. The need for norms and "self-policing" is recognized; unhealthy behavior is identified and dealt with by the vestry as a whole.
- Clergy **understand boundaries** and the importance of self-differentiation.
- The Rector and Senior Warden are **clear about their respective roles** and meet often enough to develop trust and personal support.
- The Rector is expected to be **the leader, though not a dictator**. S/he is expected to have an agenda, but to encourage the Vestry to reshape, refine, and even reject that agenda. Patience with the slower pace of shared leadership is critical.
- The **Vestry feels competent and valued** and accepts the higher degree of accountability that goes along with collaboration. The former authoritarian model often caused Vestries to feel incompetent, unnecessary, and resentful.
- A high degree of **personal maturity and trust** is present. Confrontation is direct, respectful and centered in role and function, rather than passive-aggressive and centered in personality. All understand triangulation and work to eliminate it in the congregation.

- Decision-making is an **open process**. In healthy systems, clergy keep Vestry members informed; lay the ground for discussions, rather than throwing ideas onto the table without advance notice; and avoid any appearance that decisions have already been made by a secretive core group. In very large congregations, executive committees serve to focus the Vestry's time and to fashion proposals for Vestry action, but do not make decisions.
- Clergy and lay leaders are **team players and consensus builders**, rather than "lone rangers," legalists, or people with a specific agenda.
- Vestry structures are considered flexible, needing to be "**reinvented**" regularly.
- The Vestry's **spiritual agenda** is clear. Rector and Vestry pray, worship regularly, and take stewardship seriously. The tithe is frequently acknowledged as normative.
- Leaders pay attention to the **quality** of Vestry meetings. Some have dinner first to promote relaxed fellowship. Several are reconsidering meeting space: moving away from the long tables, which reflect a board-of-directors style and moving toward chairs in a circle with no able.

II. New ways to work together

Surveys indicate that the most satisfied clergy are those who have "significant clarity about their roles and about the roles of key lay readers." However, those roles are in the process of being changed and redefined as are the ways that clergy and lay leaders function together. In many parishes the Rector/Vestry system is changing away from an authoritarian, "Father knows best" system to a more collaborative, consensus-based relationship. While both laity and clergy welcome this, the roles and expectations of each are still being defined.

Some new ways that clergy and lay leaders are working together include the following:

- **Delegation of duties:** Although most congregations continue to observe the traditional delegation of duties, with clergy handling pastoral care, worship, and program and lay leaders handling finances, property, and fund-raising, these distinctions are blurring and, in fact, are considered unhelpful by some. There is a recognition that the dichotomy between secular and sacred needs to be overcome. The emerging trend seems to be that clergy and lay leaders function best where they feel most capable.
- **Vestry action:** Vestries are learning to deal with stresses in the parish directly, rather than by passing those stresses on to the Rector to handle alone. In general, lay and clerical leaders reject the former parent-child system and are seeking a system where "the Rector enables the Vestry to feel competent and where the Rector can be a "non-anxious presence."

- Most Vestries have moved away from parliamentary procedure grounded in motions, votes, and majority rule in favor of a **consensus model**, in which leaders keep discussing and refining until they arrive at a decision that everyone can live with. Consensual decision-making requires a group process marked by openness, a commitment to say it all at the table in front of everyone, and personal maturity. This emerging system seems less open to single-agenda people, leaders who stay silent and then "lob grenades," and leaders who wait for the parking lot and grapevine.

Vestry members have, in fact, had to learn how to confront negative and disruptive behavior and how to prevent triangulation. Consensual decision-making requires the Rector to be flexible, patient, a good listener, and skilled in group process. Vestry members need the same skills and attributes.

- **Vestry training** is stressed more. **New members overlap** with retiring Vestry members for at least a few sessions to promote continuity and avoid sudden shifts of focus. All members are clear about explanations of Vestry duties, parish by-laws, Vestry policies and norms, Anglican polity and ethos, and understanding financial statements. Many vestries go on at least one retreat a year; several Vestries have two: one focused on team building and the other on goal-setting or other business.
- Vestry **nominating processes are changing**. Vestries and Nominating Committees are discouraging special-agenda candidates from standing for election and seeking out persons with "broad vision" rather than those representing a particular constituency or cause. Some congregations are experimenting with new ways to handle the nominating process. Most have outgoing members nominate two candidates for every slot to be filled. Some congregations are debating a slate system, in which only six are nominated for six slots because those who lose an election feel humiliated and are unwilling to run again or may even leave the parish. There is great concern to avoid bringing onto the Vestry unhealthy personalities who might disrupt a collaborative system, and yet, it is imperative to assure diversity on the Vestry and in other leadership roles.
- **Clergy wellness** is valued; a strong support system needs to be in place. Many congregations value Clergy **sabbaticals**.
- Training for both clergy and laity in **conflict management** and in **power**, including how to build consensus, how to let go, how to maintain decision-making processes that are inclusive, open, consensual and fair. There is a growing awareness that disempowered people take up a lot of airtime in meetings.
- The **use of outside consultants**, to provide fresh perspectives, to undo minor logjams, to encourage effective communications, and to guide systems through major crises.

- **Accountability** is an issue that is far from being resolved. Vestry members tend to see their bottom-line role as serving the people who elected them, and doing so at least partly by holding clergy accountable. Clergy aren't in a clear position to hold volunteer leaders accountable. Clergy tend to see lay leaders not as employers to be pleased or employees to be disciplined, but as partners in ministry. Efforts are moving toward candid dialogue, occasional confrontations, sorting out together what the real issue is and how to resolve it together.
- Vestries are rethinking how they **structure meetings**. Agendas are being changed to put high-priority items up front, when energy is highest, rather than the traditional model of minutes and treasurer's report first. Putting financial reports lower on the agenda prevents their controlling the meeting. Sometimes, they even omit them in order to draw attention to other matters. Several Vestries start with an extended spiritual focus, either in small sharing groups or in a general time of study and prayer.

There is no single way to approach mutual ministry.

Congregational Development in the Diocese Mutual Ministry Review

A Simple Effective Model

Goal: For clergy and lay leaders to speak the truth in love, to affirm each other's strengths, and to develop or reaffirm for a shared sense of direction.

Participants: Clergy, Wardens, and Vestry

Equipment Needed: Flip chart, paper, and markers

Process:

- A. Agree on what period of time is being reviewed (e.g. the last year, time since the rector's arrival, or period since last mutual ministry review) and then develop a list of accomplishments in that period.
- B. Make three columns on a new flipchart page, one each for clergy, wardens, and vestry. List strengths demonstrated by each during the period.

[**Note:** people are welcome to list strengths that they themselves feel they have demonstrated, but it is much more affirming to hear it from someone else!!]

- C. Create a new list entitled "What could be improved or done differently"
- D. Identify concrete next steps to address concerns raised on the list created in C above. For each next step it should be clear who is responsible for seeing that the step gets done. In addition, it should be decided when progress on this list of concrete next steps will be evaluated.

[**Note:** Depending on how long it took to do steps 1 – 3 and the group's energy, D may require an additional session]