



Office of Clergy  
Excellence

Florida Conference The United Methodist Church  
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## Eight Year Assessment BOD 349.3 EYA PROPOSAL (3-1-18 PRELIMINARY DRAFT)

### The 3Rs of Flourishing In Ministry: REVIEW, RENEW, RETOOL

Our goal is to help clergy flourish in ministry over a lifetime of service.

All clergy who have been serving in ministry for 8 years or more will be invited to **(or required to?)** participate in a six month 3Rs Flourishing In Ministry process. The process begins with a time of **REVIEW**.

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#### 1. REVIEW

This is a time for the clergy person to reflect back on their prior years of ministry and review their overall health in all aspects of their lives and ministry.

This includes a review of their:

- Spiritual health
- Physical health
- Emotional health
- Financial health
- Social health
- Ministry health

A series of tools are recommended below for the clergy person to select from to review themselves, or to have others review them using 360 evaluations, in each of these many areas of health. Each clergy person should develop a proposal to submit to their DS for approval, of which tools they will utilize in their **REVIEW** process, as well as their plan for **RENEWAL** (See section 2. Below). A development plan for **RETOOLING** (See section 3. Below) and a **FINAL REPORT** will be sent to the DS following the six month 3 Rs Flourishing In Ministry process of **REVIEW, RENEW and RETOOL**. \$750 of MEF funds per quadrennium are available through the Office of Clergy Excellence to assist with associated costs if these have not been used by the clergy person for other purposes).

#### Examples of tools to be included are:

1. Wellbeing at Work: Flourishing in Ministry Assessment - Matt Bloom University of Notre Dame <http://wellbeing.nd.edu/flourishing-in-ministry/>

2. GBHEM EM360 - [http://www.bomlibrary.org/wp-content/uploads/2018/02/EM360.Flyer\\_.pdf](http://www.bomlibrary.org/wp-content/uploads/2018/02/EM360.Flyer_.pdf)
3. Connective Leadership 360 <https://www.connectiveleadership.com/assessments/>
4. Leadership Circle 360 <https://leadershipcircle.com/assessment-tools/profile/>
5. Lewis Center LPLI - 360 <https://www.lpli.org> IDI Intercultural Development Inventory <https://idiinventory.com> (\$18)
6. Intercultural Effectiveness Scale IES <https://www.kozaigroup.com/intercultural-effectiveness-scale-ies/>
7. FIRO-B <https://shop.cpp.com/products/firo-b/index.aspx>
8. Wespath Financial Health Assessment (free to all UMC clergy) <https://www.wespath.org/center-for-health/resources/five-dimensions-of-health-financial/>
9. WebMD online Health Assessment <https://www.webmdhealthservices.com/product/health-assessment/>
10. Baron EQi 2.0 360 Emotional Intelligence Assessment <https://tap.mhs.com/EQi20.aspx>
11. Emotional Intelligence 2:0 Self assessment <http://www.talentsmart.com/test/> (\$10.79)
12. Johari Window <http://kevan.org/johari> (Free)
13. Kolbe Assessment <https://www.flumc.org/kolbeassessment> (\$45 - Janet Earls)
14. DISC <https://discpersonalitytesting.com/free-disc-test/> (Free version is available)
15. Enneagram <https://www.enneagraminstitute.com/type-descriptions/> (Justin La Rosa and Magrey Devega are trained facilitators)
16. Birkman Assessment of Personality and Leadership Style (see <https://www.txcumc.org/files/fileslibrary/birkmanflier.pdf>)
17. MBTI Myers-Briggs <http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/home.htm?bhcp=1> (Terri Hill is a trained facilitator)
18. Thomas-Killman Conflict Style Inventory <http://www.kilmandiagnostics.com/overview-thomas-kilmann-conflict-mode-instrument-tki>
19. strengthsfinder <https://www.gallupstrengthscenter.com>
20. MCORE Motivational Core Assessment <https://motivationalcore.com>

***IMPORTANT NOTE: Unless there is a coaching or mentoring process involved to review the results and to assist the clergy person in interpreting the results of these tests for the purposes of implementing a development plan for retooling, their effect will be minimal.***

***See step 2: RENEW below***

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## **2. RENEW**

The RENEW period is designed for clergy to schedule time away from their regular duties to reflect, discuss with others, and learn from the REVIEW materials. Some suggestions follow:

1. Peer Group Review - Clergy review results of the REVIEW with a group of peers
2. Review with SPPRC
3. Spiritual Directors - individual or as a covenant group <https://www.flumc.org/shadeandfreshwater>
4. Counselors
5. Retreats
6. Time of renewal leave for Continuing Education and Spiritual Growth BOD 350 (A limited number of grants for leave are available from the Office of Clergy Excellence)
7. Covenant Group Retreats
8. Clergy Mentors
9. Continuing Education events

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### 3. RETOOL

The third step of this six month process is to develop a plan for retooling. This plan should be submitted to your DS. Since it may take longer than 6 months to work the plan, a final report on the clergy person's learnings and insights should be submitted to the DS after the plan has been implemented.

1. Develop a Webinar on Leadership and Administration by Bob Winstsal - Candler School of Theology, Emory University
2. Coaching available through Melissa Cooper, Anne Burkholder, Janet Earls
3. Spiritual Direction <https://www.flumc.org/shadeandfreshwater>
4. Courage to Lead <https://www.flumc.org/couragetolead>
5. Institute of Preaching <https://www.flumc.org/instituteofpreaching>
6. Marcy Preaching Institute <https://www.flumc.org/marcypreachingfellowship>
7. Wesley Study Retreat in England <https://www.flumc.org/wesleystudyretreat>
8. Reynolds Leadership Program <https://www.flumc.org/reynoldsleadershipprogram>
9. Generative Leadership Academy New Church Development Office, Florida Conference.
10. Great Beginnings <https://www.flumc.org/greatbeginnings>
11. Five Day Spiritual Academy <https://www.flumc.org/fivedayacademy>
12. UMC online courses <http://www.umc.org/search/gcse?q=Online%20UMC%20courses>

***NOTE: Some of these continuing education events are by invitation only. Contact your DS if you are interested in being considered.***

#### **Next steps for the EYA Planning Team:**

1. Develop a survey for all clergy with questions such as: (Sara and Melissa)
  - A. # of years in ministry
  - B. Top 3 issues you are struggling with that keeps you from flourishing in ministry
  - C. Top 3 things you wish you knew when you first started in ministry
  - D. NOTE East Ohio Conference has constructed a clergy morale survey.
2. All members of the EYA Team to contribute on Basecamp with potential REVIEW, RENEWAL or RETOOLING resources.
3. All members of the EYA Team to edit, add to, comment on the above proposal.

**The 3Rs of Flourishing In Ministry: Review, Renew, Retool –(EYA)  
REVIEW PROPOSAL**

**To address: Spiritual, Physical, Emotional, Financial, Social and Ministry Health**

Clergy Name: \_\_\_\_\_

Name of Appointment: \_\_\_\_\_ Date of appointment: \_\_\_\_\_

Date started Licensed or Ordained ministry in the UMC: \_\_\_\_\_ Clergy status: \_\_\_\_\_

**1. Health Issues I would like to address during my 3Rs Flourishing in Ministry Process:**

**2. Tests, Assessments, and Methods I would like to use to review my overall health:**

DS Approval of REVIEW Proposal: \_\_\_\_\_ Date: \_\_\_\_\_

**RENEW PROPOSAL**

**1. Specific ways I would like to spend my time of RENEWAL:**

**2. How I would like to process the information gleaned from my REVIEW process:**

DS Approval of RENEW Proposal: \_\_\_\_\_ Date: \_\_\_\_\_

**RETOOL PROPOSAL**

**1. My RETOOLING plan to address issues identified through my REVIEW/RENEW process:**

**2. What I have learned as a result of implementing my RETOOLING plan:** Attach the results of any tests or assessments you wish to share from your REVIEW process.

DS Approval of RETOOL Proposal: \_\_\_\_\_ Date: \_\_\_\_\_

DS Approval of Final Report: \_\_\_\_\_ Date: \_\_\_\_\_

### **2016 Book of Discipline**

**349.3.** Every clergyperson shall also engage in a six-month process of personal and professional assessment and development every eight years. The process will be designed and implemented by the cabinet and Board of Ordained Ministry for each annual conference in consultation with the Chairs of the Orders of Deacons and Elders and Fellowship of Local Pastors and Associate Members. The process shall include both a formal review and an in-depth renewal opportunity, such as a retreat or series of coaching and mentoring sessions.

- a) The formal review shall include a self-evaluation, metrics appropriate to the ministry settings to which clergy are appointed, observations of trends from the previous eight years, and reviews or interviews with people close to the ministry of the clergy being reviewed.
- b) The in-depth renewal opportunity shall be designed by the cabinet and Board of Ordained Ministry in a form appropriate to the conference. The renewal opportunities shall include a combination of elements, such as: time apart for prayer and reflection, reflection with a covenant group, meetings with a coach, celebration of ministry milestones, and discernment of future ministry challenges and opportunities. When deemed important to help in the evaluation process, psychological assessments may be requested by the cabinet or Board of Ordained Ministry.
- c) The district superintendent shall review the portfolio and provide the initial report of the eighth year review of effectiveness. When recommended by the district superintendent, a meeting with the bishop and members of the cabinet may be held.
- d) Each annual conference shall develop and initiate a plan for such assessment by January 1, 2020.