

## Annual Development Review

### Basic Information

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<b>Status of Paper</b>	Final
<b>Action Required</b>	For decision
<b>Draft Resolution</b>	The Methodist Council: <ol style="list-style-type: none"> <li>a. acknowledges and commends the work undertaken by the ADR Pilot Steering Group and within the ADR pilot districts;</li> <li>b. recommends to the Conference that ADR is not implemented outside the five ADR pilot districts in the 2009/2010 connexional year;</li> <li>c. affirms the importance of robust ministerial review processes;</li> <li>d. authorises ongoing work on developing a ministerial review process for the Methodist Church, addressing the issues of substance identified during the ADR pilot;</li> <li>e. authorises the Connexional Team to support the five ADR pilot districts in their delivery of ADR-based ministerial review processes during the 2009/2010 connexional year.</li> </ol>
<b>Alternative Options to Consider, if Any</b>	

### Summary of Content

<b>Subject and Aims</b>	This report forms the substance of a report to the 2009 Conference on Annual Development Review (ADR). The Council is asked to recommend that ADR is not implemented during the 2009/2010 connexional year.	
<b>Main Points</b>	This report presents findings from the ADR pilot run in five districts in the 2007/2008 and 2008/2009 connexional years. It acknowledges and commends the work undertaken during the pilot. It also identifies issues of substance which have emerged as a result of the pilot. It suggests that the Council recommends that that ADR is not implemented during the 2009/2010 connexional year, and proposes future work in light of this suggestion.	
<b>Background Context and Relevant Documents (with function)</b>	<i>Annual Development Review – an appraisal scheme for Presbyters and Deacons</i> (report to the 2007 Conference)	
<b>Consultations</b>	ADR Pilot Steering Group, Chairs of District, the Faith & Order Committee	

### Summary of Impact

<b>Standing Orders</b>	Indefinite suspension of SO743
<b>Faith and Order</b>	Section 2 refers to a number of Faith and Order issues
<b>Financial</b>	None
<b>Personnel</b>	None
<b>Legal</b>	An effective ministerial review process forms a part of the minimum standards which faith organisations should aim to achieve, as set out in the Model Statement of Good Practice (March 2007) formulated by the Clergy Working Group of the DTI
<b>Wider Connexional</b>	Impact on all ordained ministers in the active work
<b>External (e.g. ecumenical)</b>	None
<b>Risk</b>	An effective ministerial review process is central to the Methodist Church's developing strategies to equip its ordained and authorised ministries

## Annual Development Review

### 1 Background

- 1.1 The 2007 Conference, under resolution 22/1, adopted the report *Annual Development Review – an appraisal scheme for Presbyters and Deacons*. The report recommended that ADR should be piloted during the 2007/2008 and 2008/2009 connexional years in five districts. The five ADR pilot districts were Bristol, Manchester & Stockport, Sheffield, Southampton and Wolverhampton & Shrewsbury.
- 1.2 The 2007 Conference, under resolution 22/2, suspended the operation of SO743 in relation to ministers stationed in the ADR pilot districts. SO743 requires ministers to engage annually in the process of Accompanied Self-Appraisal (ASA).
- 1.3 An ADR Pilot Steering Group was formed in July 2007 to support the pilots. The group members, drawn from the five ADR pilot districts, were: Mr Andrew Owen, Bristol; Mr Roger Drinkwater and the Revd Malcolm Weatherby, Manchester & Stockport; Mr David Clark and Ms Caroline Riley, Sheffield; Mrs Lesley Boardley and Mr Stuart Daughters, Southampton; and, the Revd Stuart Davis, Dr Ken Mothersdale and Mr Charles Worth, Wolverhampton & Shrewsbury. An ADR Pilot Steering Group Coordinator, Mr Ian Carter-Brown, was employed to support and coordinate the pilots and support the ADR Pilot Steering Group.
- 1.4 The information about the ADR process contained in the 2007 report was collated by the Connexional Team in an ADR Handbook during the summer of 2007. A sub-group of the ADR Pilot Steering Group amended and added to the handbook in the light of their deliberations and experiences. The group also produced training materials for those involved in ADR (ordained ministers, ADR Reviewers and ADR Facilitators).
- 1.5 In July 2008, the Faith & Order Committee was asked by the Connexional Team to prepare a brief theological preface for the ADR Handbook and to assess the ADR process as outlined in the latest version of the handbook.
- 1.6 This report presents findings that have emerged as a result of the ADR pilot and makes recommendation for future work. Feedback was provided from the ADR Pilot Steering Group, Chairs of District, the Faith & Order Committee, Connexional Team members from the Discipleship & Ministries Cluster and others who contacted the Connexional Team directly with concerns or comments.

## **2 Findings**

### *2.1 The work of the ADR Pilot Steering Group*

Those involved in the scheme at district level acknowledged and commended the work undertaken by the ADR Pilot Steering Group since 2007. Evaluations emphasised the positive experience which many ministers, ADR Reviewers and ADR Facilitators had received from participating in the ADR pilots.

### *2.2 Authority, accountability and oversight*

A review process such as ADR exists within the context both of formal patterns of ordained ministerial accountability and oversight, and also of informal patterns of authority within local churches and circuits. In this area, feedback from the ADR pilots and from stakeholders has identified the following:

- 2.2.1 The need to explore a formal role for superintendent ministers and circuit stewards (and, therefore, for lay and ordained circuit officers) in a review process such as ADR.
- 2.2.2 The need to explore the links between the formulation by ordained ministers of objectives during a review process such as ADR and the objectives and aims of circuits.
- 2.2.3 The need to address the inconsistency in the interpretation of the role of ADR Reviewer within and across the ADR pilot districts, especially regarding the degree of intervention and direction which should be practiced by the ADR Reviewer.
- 2.2.4 The need for greater exploration of the perception of review process such as ADR as line-management processes, and greater exploration of the discourse of line-management, appraisal and supervision in the context of ministerial accountability and oversight, especially as expressed in Conference reports such as *'What is a Superintendent?'* and *'What is a Chair?'*

### *2.3 The rhythm of an appointment*

A review process such as ADR exists within the context of itinerancy and fixed-term ministerial appointments. In this area, feedback from the ADR pilots and from stakeholders has identified the following:

- 2.3.1 The need to explore further the links between a review process such as ADR and the re-invitation process.

The 2007 report recommended that the ADR scheme should not be formally linked to the re-invitation process. However, the report also stated that “if there is a regular conversation about the agreed aims and focus of work... this should reduce some of the misunderstanding and stress that can happen sometimes before and during re-invitation process” [3.1.6]. There are concerns about the feasibility of not linking the two processes and about the danger of informal links. There are also concerns about the duplication of work in undertaking both a review process such as ADR and a re-invitation process in, for example, the fourth year of a five year appointment.

- 2.3.2 Concerns about the starting point for conversations in the first year of an appointment, and the status of letters of invitation and circuit profiles.

#### 2.4 *Learning and development*

A review process such as ADR has a central role in the development of learning and development (L&D) provision for ordained ministers. In this area, feedback from the ADR pilots and from stakeholders has identified the following:

- 2.4.1 An increase in requests for L&D provision from ordained ministers participating in the ADR pilots.
- 2.4.2 The need for a greater emphasis on the role of continuing formation as an aspect of ordained ministry, and greater explicit exploration of continuing formational opportunities and obligations for ordained ministers.
- 2.4.3 The need for a clearer understanding of the role of a review process such as ADR in identifying L&D needs.
- 2.4.4 The need for a clearer pathway linking L&D needs identified during a review process such as ADR to the development and delivery of local, regional and connexional L&D programmes.

#### 2.5 *Spiritual direction, Coaching and mentoring*

A review process such as ADR should complement ordained ministers’ existing methods of reflective development, and should encourage greater reflection. In this area, feedback from the ADR pilots and from stakeholders has identified the following:

- 2.5.1 Concern about the loss of the ‘accompaniment’ component of ASA,

2.5.2 Concern about the lack of sufficiently prominent guidance about the importance of complementary pathways for reflective development (eg spiritual direction, coaching, mentoring) and the incorporation within ADR of insights from these processes.

## 2.6 *Implementation, communication, monitoring and evaluation*

A connexion-wide review process such as ADR is a potentially intensive process, making great demands of districts and circuits. As a connexion-wide scheme, the need both to communicate clearly and to have transparent monitoring and evaluation methods in place is important. In this area, feedback from the ADR pilots and from stakeholders has identified the following:

2.6.1 Concern about the number of people required to implement ADR, and reports from some districts of difficulty in recruiting ADR Reviewers and ADR Facilitators.

2.6.2 Concern about the feasibility of replicating the level of support and attention given to ADR participants in the ADR pilot districts in the case of the connexion-wide implementation of ADR.

2.6.3 Concern about poor communication between the Connexional Team, the ADR Pilot Steering Group and the wider connexion during the pilots.

2.6.4 The need to explore alternative review processes being developed and implemented in some districts, and the implications of such developments for the feasibility of a connexion-wide review process.

2.6.5 Concern about the lack of a communication strategy for the connexion-wide implementation of ADR.

2.6.6 The need for greater exploration of the feasibility of the staggered implementation of ADR within districts.

2.6.7 The need for better established roles, responsibilities and processes for connexion-wide monitoring and evaluation, mindful in particular of the recommendation of the 2007 report that the ADR scheme should be reviewed after its first full year of operation and annually thereafter.

## **3 Conclusion**

3.1 ADR was well received in ADR pilot districts. However, the ADR pilot also identified – as good pilots should – a number of issues of substance which, if left unaddressed,

would have implications for the long-term viability of ADR, and might limit the success of the Methodist Church's developing strategies to equip its ordained and authorised ministries.

- 3.2 Serious consideration should therefore be given by the Methodist Council to not implementing ADR across the connexion in the 2009/2010 connexional year.

#### **4 Future work**

If ADR is not implemented across the connexion in the 2009/2010 connexional year, the proposed actions are suggested:

- 4.1 Work should continue on ministerial review processes, addressing the issues of substance identified during the pilot. This work should aim to provide, for implementation in September 2011, an effective ministerial review process, and should include:
- 4.1.2 Discussions with the Faith & Order Committee and other connexional committees.
- 4.1.3 The establishment during the 2009/2010 and 2010/2011 connexional years of a shared understanding across the connexion of the underlying principles and aim of ministerial review processes, especially through learning and development initiatives (implemented in collaboration with Training Officers and Regional Training Networks).
- 4.2 Negotiations with the five ADR pilot districts concerning the review processes to be used within the five districts during the 2009/2010 connexional year.
- 4.3 Districts who have already begun to bring to a close their ASA programmes should not be directed to reverse this process, and that Standing Orders should be suspended accordingly.

#### **5 Recommendations**

The Methodist Council:

- a. acknowledges and commends the work undertaken by the ADR Pilot Steering Group and within the ADR pilot districts;
- b. recommends to the Conference that ADR is not implemented outside the five ADR pilot districts in the 2009/2010 connexional year;
- c. affirms the importance of robust ministerial review processes;

- d. authorises ongoing work on developing a ministerial review process for the Methodist Church, addressing the issues of substance identified during the ADR pilot;
- e. authorises the Connexional Team to support the five ADR pilot districts in their delivery of ADR-based ministerial review processes during the 2009/2010 connexional year.