

## **What Next for Evaluation of Bishops?**

**by Lovett H. Weems, Jr.**

Accountability is the watchword throughout the church today. Bishops understand that they must demonstrate openness to review and feedback if they are to have the moral authority they need to hold others accountable for faithful and fruitful ministry. Bishops also know that few things are more important for growth as a leader than constructive feedback. Yet evaluation is an uncomfortable topic in all settings, and it seems to be especially so in the church. We are reluctant to do it and generally are not good at it.

Bishops also operate under another constraint. Those who observe leaders across occupations have long noticed a tendency for leaders to stop growing when they reach the top positions in their organizations. For years, the highly regarded Center for Creative Leadership has offered seminars for business chief executives called “Leadership at the Peak” to address such concerns. Researchers there discovered that one reason those at the top stop growing is that they achieved success over the years because they were adept at learning from their experience and particularly good at engaging feedback to improve their performance. However, once they reach the top positions, they discover that the feedback they had always depended on from others rarely is available.

The 2008 *Book of Discipline* required the jurisdictional and central conference episcopacy committees to evaluate each active bishop (paragraphs 412 and 524.3a). This report focuses on the U.S. jurisdictional conferences. The episcopacy committees are made up of one clergy and one lay person from every annual conference in the jurisdiction. Members are selected by the conferences and are normally persons of high credibility within their conferences.

While such evaluation had occurred in some areas previously, this was the first time the committees were required “to establish and implement processes” to evaluate each active bishop at least once every four years. The assessments must include self-evaluations from the bishops, input from their episcopal peers and comments from individuals affected by their leadership. According to a United Methodist News Story by Heather Hahn, four of the five U.S. jurisdictional episcopacy committees had developed and implemented evaluation instruments and protocols by 2012 (“What Goes on a Bishop’s Report Card?” July 17, 2012).

## **What’s Next in Light of the South Central Jurisdiction Experience?**

As a result of the evaluation process in the South Central Jurisdiction, their episcopacy committee recommended and the South Central Jurisdictional Conference affirmed that an active bishop be compelled to take involuntary retirement, an action that had been available to committees within certain parameters since 1976 but never before used. Despite a series of hearings and appeals and decisive votes by the committee and the jurisdictional conference, the Judicial Council of the denomination ruled the action unconstitutional and reinstated the bishop.

It is difficult to know what the effect of the South Central Jurisdiction case will be on evaluation of bishops in the new quadrennium. One doubts that committees will be inclined, for a long time, to make hard decisions when faced with negative reviews. But there may be ways to improve the process so that it helps good bishops get better, which is always the primary purpose of evaluation.

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One thing that the South Central Jurisdiction case brought to light was the variety of instruments and processes jurisdictions use in their reviews. Interestingly, the South Central Jurisdiction had one of the most comprehensive instruments and detailed processes among the jurisdictions. United Methodist News Service gathered those instruments and made them available (<http://www.umc.org/site/apps/nlnet/content3.aspx?c=IwL4KnN1LtH&b=8231525&ct=12012121&notoc=1>).

All the jurisdictions that developed evaluative instruments began with the categories of episcopal responsibilities outlined in the 2008 *Discipline* (paragraphs 403, 414-416) with some adding other items they deemed important to their jurisdictions.

### **Review of the Current Instruments**

One of the drawbacks of all *Discipline* descriptions of offices in the church is that they rarely distinguish among more and less important roles. What follows is an attempt to analyze, from a leadership perspective, the evaluation instruments used last quadrennium from four jurisdictions. Different jurisdictions often use different language for similar subjects, so the list that follows does not include every word from each instrument. Rather it captures the topics and themes, but with an effort not only to sort and simplify but also to group by priority based on what contributes most to visionary and transformative leadership.

As I have assessed the importance of these categories, I have divided them into three tiers. The first includes those that measure substantive personal leadership and would seem the most significant for assessing the effectiveness of a bishop. The second, except for bishops completing two or three quadrennia, seems not as informative and useful for the reasons I list. The third has categories that are, of course, crucial--but only become significant in their absence. They would be very significant measures if there are high negatives at any point.

#### **Tier One - High Impact Areas**

This first tier reflects the most important leadership categories because they are the areas

- that are the most direct expressions of the bishop's personal leadership,
- that most impact clergy and congregations (especially appointment-making, which directly affects every person in the conference), and
- over which the bishop has most control.

*Italics indicate that the item comes from the 2008 Book of Discipline, paragraphs 403, 414-416.*

#### **Leader**

- *Leads and oversees the spiritual and temporal affairs of The United Methodist Church, which confesses Jesus Christ as Lord and Savior.*
- *Leads the whole Church in claiming its mission of making disciples of Jesus Christ for the transformation of the world*
- *Leads the Church in its mission of witness and service in the world*
- *Discerns, inspires, strategizes, equips, implements, and evaluates the fulfillment of the mission of the Church.*

### **Visionary**

- *Establishes, articulates, and maintains focus on a vision for the future of the conference*
- In developing and establishing a vision for the conference, solicits and gathers input from those served, and leads processes that promote “buy in” by clergy and laity
- Initiates strategic planning, and establishes goals, strategies and tactics for the annual conference
- Creates alignment between the stated mission and vision of the conference and the structures and financial resources of the annual conference

### **Team Builder**

- Chooses and enables effective leaders, *giving particular care to the selection annually of district superintendents*
- Builds the team needed to accomplish the Church’s mission and the Conference’s vision
- Establishes a “leadership culture” throughout the annual conference

### **Motivator**

- *Urges the whole church to move toward the vision of sharing Christ with the world in fulfillment of our mission*
- *Inspires the clergy and laity within the Church to practice the Christian disciplines*
- Exercises leadership and communication styles appropriate to the context
- Builds trust and inspires respect
- Earns respect and trust from laity and clergy

### **Appointment Maker**

- *Consecrates, ordains, commissions, supervises and appoints persons in ministry to the Church and the world*
- Develops and manages an effective appointment process that supports the mission and vision of the conference
- Practices and promotes consultation process (with pastors and churches)
- Maintains objectivity and consistency
- Balances concern for pastors and churches
- Implements open itinerancy
- Encourages open and honest dialogue with the cabinet
- Balances the tension between itinerancy and healthy longevity in appointments

### **Administrative Responsibilities in Episcopal Area**

- *Upholds the discipline and order of the Church*
- *Provides general oversight for the fiscal and program operations of the annual conference*
- *Ensures fair process for clergy and laity in all involuntary administrative and judicial proceedings*
- Handles sensitive issues appropriately

### **Ongoing Formation as a Growing Leader**

- *Has an inquiring mind*
- *Continues to learn and to teach how to make disciples and lead faithful and fruitful congregations using scripture, spiritual disciplines, our Wesleyan heritage, and the history and doctrines of the Church*
- Cares for the body and mind as well as the spirit and family life
- Takes the initiative to find and engage in ongoing learning opportunities

## **Tier Two - Missional Initiatives**

The second tier reflects areas that become increasingly significant for evaluation the longer a bishop has been in an episcopal area.

Initiatives to fulfill the church's mission are at once both extremely important and hard to link to cause and effect in the short term (one quadrennium). There is an inevitable leadership lag time. Statistics for any year normally reflect initiatives taken several, often many, years before. Therefore, taking account of the length of episcopal service in an episcopal area is important here. For example, for bishops completing their first terms, the *plans and action steps* during the first quadrennium become *more important than current statistics* given the leadership lag time. For bishops completing two or three quadrennia in the same assignment, the statistical results become a much more reliable source of evaluative data.

However, in assessing performance on these missional initiatives, the episcopacy committee needs to avoid assessments that fail to take account of the demographic variations found in the jurisdiction. For example, in one study the Lewis Center for Church Leadership conducted for a jurisdiction, the Center found three episcopal areas of both large current population and large projected population growth and two episcopal areas of low current population and large segments of projected population decline. All the other episcopal areas fell between these extremes. Therefore, even if all bishops were functioning at the same high level, the results would be very different given their differing contexts.

One other factor that distinguishes Tier Two from Tier One is that Tier Two categories are much more dependent upon the effectiveness, or lack thereof, of many people other than the bishop, including clergy and laity who themselves may be performing at different levels across episcopal areas.

### **Missional Initiatives**

- Starts new churches
- Increases church membership and worship attendance
- Develops inclusive and multi-cultural congregations
- Transforms existing congregations
- Develops principled Christian leaders for the church and the world
- Expands ethnic/racial ministries
- Strengthens clergy and lay leadership
- Reaches and transforms the lives of new generations of children and youth
- Eliminates poverty in community with the poor
- Advocates for improved global health

### **Tier Three – Ticket for Admission Categories**

The third has categories that are, of course, crucial--but only become significant in their absence.

This tier contains two sections that are appreciably different qualitatively but have in common that they are basic assumptions people have a right to expect no matter who is in the office. To do these things does not make someone stand out as a leader, but to fail is a cause for grave concern. These should be so taken for granted as going with the office that no special merit attains to their fulfillment. Thus, normally these categories need only enter into evaluative conversations in the rare case where one or more is observed to be missing in a bishop's life and ministry.

### **Foundational character issues**

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- *Faithfully practices, models, and leads the spiritual disciplines of our faith*
- *Reflects the Christian faith in lifestyle and personal disciplines*
- *Models the mission of witness and service in the world*

### **Responsibilities rightfully expected but hardly benchmarks of leadership**

#### **Qualities**

- *Has a vital and renewing spirit*
- *Is enthusiastic and energetic*
- *Communicates clearly and effectively*
- *Is open to new ideas*

#### **Administrative Responsibilities**

- *Presides skillfully at Annual Conference*
- *Demonstrates commitment to inclusiveness*
- *Promotes faithful stewardship and fiscal responsibility*

#### **Preaching and Teaching**

- *To guard, transmit, teach, and proclaim, corporately and individually, the apostolic faith as it is expressed in Scripture and tradition*
- *Leads in public worship, in the celebration of the sacraments and in the commendation of our faith*
- *Commitment to the teaching office*
- *Teaches and upholds the theological traditions of The United Methodist Church*
- *A prophetic commitment for the transformation of the Church and the world*
- *Is a prophetic voice for justice in a suffering and conflicted world*
- *Preaches and teaches in local churches, districts, and the conference*
- *Preaches and teaches for commitment and deepened discipleship*
- *Promotes, supports, and models generous Christian giving, and gives special attention to teaching the biblical principles of giving*
- *Promotes and supports the evangelistic witness of the whole Church*
- *Teaches the Wesleyan model of making and forming disciples*

#### **Relationships**

- *Builds relationship with people of local congregations of the area*
- *Practices good relational skills*
- *Builds healthy relationships with deacons, elders, local pastors, clergy in extension ministries, ethnic/language groups*
- *Develops relationships with laity and partnerships between laity and clergy*

#### **Strengthens the Connection**

- *Strengthens the local church, giving spiritual leadership to both laity and clergy;*
- *Leads in new opportunities for ministry within the annual conference*
- *Shares with other bishops the oversight of the whole Church*
- *Passionately supports connectional giving*
- *Reclaims the significance of covenant and connection*
- *Balances ministry within the annual conference with the responsibility to travel through the connection at large to implement strategy for the concerns of the Church*

- *Provides leadership toward the goal of understanding, reconciliation and unity within the Church—the United Methodist Church and the church universal*
- *Provides liaison and leadership in the quest for Christian unity in ministry, mission, and structure and in the search for strengthened relationships with other living faith communities.*
- *Interprets the faith evangelistically and prophetically*
- Encourages the disciple-making process at the local church level

## **Observations**

1. The jurisdictional committees on episcopacy honor the Disciplinary description of the role of bishops in the 2008 *Discipline*, but they also go beyond it. This indicates that what the jurisdictional leaders are seeking most in bishops encompasses a much more varied selection of roles and responsibilities than those outlined in the *Discipline*. Most of the additions are implied in the *Discipline* but are given more specificity by the jurisdictional committees on episcopacy. Some items in the *Discipline* are not included, probably because they are so technical or assumed that they do not require inclusion.
2. While most of the items found in the evaluation instruments probably seem appropriate to bishops, it may be a good idea for the Church to identify some of the components named in the jurisdictional instruments for inclusion in the *Discipline*. In any case, there needs to be clarity between each jurisdictional committee and each College of Bishops, early in the quadrennium, regarding what the terms of evaluation are.
3. The number of episcopal roles found in the jurisdictional instruments is staggering. The length of the lists in this document is a result of the goal of capturing what was found in four different evaluation tools. Exact duplications were eliminated, but many similar items were left as distinct entries since each may capture a nuance intended by a jurisdiction. Even allowing for much more rigorous editing, the list would still be so long as to render the bishop's job unmanageable and the review unworkable without a process of combining the roles listed into fewer ones and distinguishing among categories of roles by importance.
4. One can maintain that all episcopal roles are important and still acknowledge that some are more important because of their impact, the needs to the times, or the extent to which only the bishop can perform these roles. If the Church as a whole does not wish to prioritize, jurisdictional committees in consultation with the bishops can certainly do so.
5. The four jurisdictional conferences with episcopal evaluation instruments last quadrennium have done the whole Church a great favor in sharing them for the benefit of everyone. The compilation in this report of most of the episcopal roles found in those instruments can serve to provide in one place a range of options from which jurisdictional committees, in consultation with the bishops, might draw for future reviews. The temptation is always to add more items. The more helpful direction may be to reduce the number of areas reviewed but give more attention to the fewer areas considered. One way to accomplish this task may be to keep the Tier Three "Ticket for Admission" items but only discuss them if there are problems; thus committing to spend valuable conversation time with other categories, especially those with the most impact and those over which the bishop has most control or influence.