

## 42. Annual Development Review (ADR)

### 1. Background

- 1.1 The 2007 Conference, by 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, Bristol, Manchester and Stockport, Sheffield, Southampton and Wolverhampton and Shrewsbury.
- 1.2 The 2007 Conference, by 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 and 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 and Order Committee was asked to prepare a brief theological preface for the ADR handbook, as well as to offer an assessment of the ADR process as outlined in the latest version of the handbook. The Faith and Order Committee's assessment raised a number of concerns, which complemented some of the findings emerging from the ADR pilot. The process of producing the preface was therefore suspended, and the findings of the assessment have been included elsewhere in this Report.
- 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 and Order Committee, relevant Connexional Team members and others who communicated their concerns or comments.

**2. ADR Pilot Participation**

<b>Bristol</b>	Year 1: number involved	Year 2: number involved
Ministers	9	17
Reviewers	18	34
Facilitators	6	12

<b>Manchester and Stockport</b>	Year 1: number involved	Year 2: number involved
Ministers	15	56
Reviewers	30	67
Facilitators	9	17

<b>Sheffield</b>	Year 1: number involved	Year 2: number involved
Ministers	11	33
Reviewers	18	52
Facilitators	8	22

<b>Southampton</b>	Year 1: number involved	Year 2: number involved
Ministers	6	6
Reviewers	9	10
Facilitators	2	2

<b>Wolverhampton and Shrewsbury</b>	Year 1: number involved	Year 2: number involved
Ministers	36	48
Reviewers	61	78
Facilitators	15	25

**3. Findings****3.1 The work of the ADR pilot steering group**

Those involved in the scheme in the five ADR pilot Districts acknowledged and commended the work undertaken by the ADR pilot steering group since 2007.

Evaluations emphasised the positive experience which some ministers, ADR reviewers and ADR facilitators had received from participating in the ADR pilots.

However, feedback from the pilot and reflections from ministers, Chairs of District, and members of the Connexional Team also raised a number of issues of substance, detailed below.

**3.2 Authority, accountability and oversight**

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

3.2.1 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.

3.2.2 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.

- 3.2.3 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 practised by the ADR reviewer.
- 3.2.4 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 Circuit Superintendent?* and *What is a District Chair?*).

### 3.3 The rhythm of an appointment

A review process such as ADR exists within the context of an itinerant ministry. In this area, feedback from the ADR pilots and from stakeholders has identified the following:

- 3.3.1 The need to explore further the links between a review process such as ADR and the reinvitation 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 reinvitation 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.

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

### 3.4 Learning and development

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

- 3.4.1 An increase in requests for L&D provision from ordained ministers participating in the ADR pilots.
- 3.4.2 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.

3.4.3 The need for a clearer understanding of the role of a review process such as ADR in identifying L&D needs.

3.4.4 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.

### **3.5 Spiritual direction, coaching and mentoring**

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

3.5.1 Concern about the loss of the 'accompaniment' component of ASA.

3.5.2 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.

### **3.6 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:

3.6.1 Concern about the number of people required to implement ADR, and reports from some Districts of difficulty in recruiting ADR reviewers and ADR facilitators.

3.6.2 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.

3.6.3 Concern about poor communication between the Connexional Team, the ADR pilot steering group and the wider Connexion during the pilots.

3.6.4 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.

3.6.5 Concern about the lack of a

communication strategy for the connexion-wide implementation of ADR.

- 3.6.6 The need for greater exploration of the feasibility of the staggered implementation of ADR within districts.
- 3.6.7 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.

#### **4. Conclusions and recommendations**

- 4.1 The ADR pilot 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.
- 4.2 The Methodist Council recommends to the Conference that ADR is not implemented across the Connexion in the 2009/2010 and 2010/2011 connexional years, but that work should continue to ensure that a connexional ministerial review process can be implemented at the beginning of the 2011/2012 connexional year.
- 4.3 An acknowledged consequence of

acceptance of this recommendation is the absence for an interim period of a connexional ministerial review process. This is considered preferable to the implementation of a scheme in which the Council cannot have full confidence.

#### **5. Future work**

On the assumption that ADR is not to be implemented across the Connexion in the 2009/2010 and 2010/2011 connexional years, the following course of action will be followed:

- 5.1 The ADR pilot will be drawn to a close. The Connexional Team will provide support to the ADR pilot Districts wishing to continue with ADR, and to those Districts which have made significant preparations to engage with ADR during the 2009/2010 connexional year and wish now to continue to do so. Observations and reflections from these Districts will contribute to the work outlined in 5.3. The Connexional Team will also provide support to other Districts as outlined in 5.4.
- 5.2 Work will continue to establish an appropriate connexional ministerial review process, addressing the issues of substance identified during the pilot. This work will aim to ensure that a connexional ministerial review process can be implemented across all Districts at the beginning of the 2011/2012 connexional year.

- 5.3 Work will also continue to establish a shared understanding across the Connexion of the underlying principles and aim of ministerial review processes, especially through L&D initiatives (initiated by the Connexional Team and implemented in collaboration with Training Officers and Regional Training Networks).
- 5.4 Thoughtful reflection on ministry, in the company either of peers or of an appropriately qualified or experienced supervisor is and will continue to be affirmed. This principle is currently contained in

SO 743 and it is important that such a principle is maintained whilst a new ministerial review process is being developed. Consequently, amendments to SO 743 are contained in the Resolutions to ensure this principle is affirmed and seen as part of the discipline of the Methodist Church. A range of suggested reflective practices (termed Reflective Learning and Development) may be found in Appendix 1 and the Connexional Team will endeavour to offer assistance in identifying appropriate practices.

## 42. Annual Development Review

### \*\*\*RESOLUTIONS

- 42/1.** The Conference received the Report.
- 42/2.** The Conference acknowledged and commended the work undertaken by the ADR pilot steering group and within the ADR pilot districts.
- 42/3.** The Conference affirmed the importance of establishing a robust, connexional ministerial review process.
- 42/4.** The Conference directed that the connexional ministerial review process set out in the report to the Conference of 2007 entitled *Annual Development Review - an appraisal process for presbyters and deacons* (currently referred to as ADR) is not to be implemented.
- 42/5.** The Conference directs the Methodist Council to oversee ongoing work to develop a connexional ministerial review process for implementation from September 2011, based on the proposed ADR process but addressing the issues of substance identified during the ADR pilot.
- 42/6.** The Conference amends Standing Order 743 as follows, to reflect the interim arrangements required consequent upon receiving this Report.
- 42/7.** The Conference deleted items 7(b) and 10(j) of the Guidelines for the District Policy Committee (CPD, Book VI, Part 2, Section 8).

### **743 Accompanied Self-Appraisal. Reflective Learning and Development**

- (1) (a) This Standing Order applies to:
- (i) every minister or deacon in full connexion and in the active work whether appointed to a station within the control of the Church or in some other appointment;
  - (ii) every minister or deacon without appointment;
  - (iii) every supernumerary minister or deacon who has entered into a formal agreement with a Circuit to undertake pastoral responsibility in one or more Local Churches.
- (b) ~~Subject to clause (5) below,~~ **Every such person shall engage annually in a process of Accompanied Self-Appraisal *reflective learning and development* in accordance with this Standing Order *this and any other relevant Standing Orders or directions of the Conference.***
- (c) The purpose of that process is to strengthen each such minister or deacon in fulfilling his or her vocation by examining three areas of accountability:

- (i) how the minister's or deacon's personal calling to ministry is currently experienced;
  - (ii) the ways in which that vocation is being fulfilled in relation to the Church as a whole;
  - (iii) the ways in which that vocation is being fulfilled in the particular appointment in which the minister or deacon is currently stationed, or, in the case of a minister or deacon serving in an appointment not within the control of the Church or without appointment, the ways in which that vocation is otherwise being fulfilled.
- (2) Each such minister or deacon shall, as part of that process:
    - (i) seek the views of people in her or his station or affected by her or his work upon her or his ministry, and
    - (ii) work with an accompanist **or other appropriate person**, who shall support him or her throughout the **self-appraisal process**.
  - (3) ~~Accompanists shall be authorised by the Synod. The district Appraisal Group is responsible for their selection and training and for recommending them to the Synod for authorisation.~~
  - (4) ~~Each Synod shall appoint a district Appraisal Group, which shall include the district Appraisal Officer and the district Appraisal Trainer, and which shall oversee all aspects of the appraisal scheme. The group shall be chaired by the Chair of the District or his or her appointee.~~
  - (5) ~~The district Appraisal Group may grant exemption according to connexional guidelines from the process to any minister or deacon whom it deems to be engaged in an alternative annual process which meets the requirements of clauses (1)(c) and (2) above, or to any supernumerary minister or deacon to whom clause (1) applies if the agreement there referred to is for a specified period of less than two years.~~
  - (6) ~~No minister or deacon shall be required to disclose the findings of his/her self-appraisal.~~
  - (7) ~~Accompanists shall inform the district Appraisal Group whether a satisfactory process of self-appraisal has been undertaken but shall not report on the work of any minister or deacon.~~
  - (8) ~~The district Appraisal Group shall report annually to the Synod on the progress of the scheme.~~
  - (9) ~~The Connexional Team shall support and monitor the scheme of accompanied~~

Self Appraisal and the Methodist Council shall report periodically to the Conference on its operation:

- (3) Where there is any dispute **as to whether the process being followed or intended to be followed by a particular minister satisfies the requirements of clause (2) above, the dispute** under clause (5) above, the district Appraisal Group shall **be referred** report to a member of the Connexional Team responsible for the scheme **ministerial reflective learning and development**, who shall consider the matter and judge accordingly.

### Appendix 1.

#### Reflective Learning and Development

Reflective learning and development is the process of reflecting on experience to improve action and practice. The term usually refers to those engaged in some kind of activity which they can use to reflect on their strengths, weaknesses and areas for development. As reflective practice is recognised as a necessary and expected component of ministry, each minister will need to identify his or her chosen method of reflective practice. This may be:

- (a) reflecting with the superintendent upon his or her ministry;
- (b) continuing an ASA arrangement;
- (c) engaging in an ADR or ADR-like process;
- (d) working with a supervisor with whom they meet regularly.