

Ministerial Development Review

Bishop's Reviewer Handbook

Contents

	Page
1 Ministerial Development Review	
1.1 Introduction by Bishop Paul	<u>3</u>
1.2 A Theology of Ministerial Development Review	<u>4</u>
1.3 Ministerial Development Review in Liverpool	<u>5</u>
2 About Bishop's reviewers	
2.1 Bishop's Reviewers	<u>6</u>
2.2 Role Description and appointments	<u>8</u>
3 The Ministerial Development Review Process	
3.1 Preparation for the Review: the initial planning conversation	<u>10</u>
3.2 Before the Review Discussion	<u>10</u>
3.3 The Clergy Preparation and Summary Document	<u>12</u>
3.4 The Review Discussion	<u>13</u>
3.5 After the Review	<u>15</u>
Appendices	
1. An overview of the MDR process	<u>16</u>
2. Guidelines for the Listening Exercise	<u>17</u>
3. The Ordinal	<u>19</u>
4. Diocesan Vision and Rule of Life	<u>20</u>
5. Setting SMART objectives	<u>22</u>
6. Resources	<u>24</u>

1 Ministerial Development Review

1.1 Introduction by Bishop Paul

On behalf of Bishop Bev and myself may I take this opportunity to express my deepest thanks and appreciation for your service in undertaking the role of Bishop's Reviewer in our diocesan Ministerial Development Review (MDR) scheme. MDR is, of course, a national requirement for all clergy under Common Tenure - but I trust that in our hands MDR is about much more than simply compliance.

The Liverpool MDR scheme is a significant element in our episcopal oversight and pastoral care of the clergy who share our ministry. As part of the process Bishop Bev and I are pleased personally to meet with all clergy about six months after their MDR.

As we all know, Christian ministry is joyful and occasionally heart-breaking; it is enriching but sometimes emotionally draining; it is a journey we share with others but can at times feel lonely. Here in Liverpool Diocese we have a clear vision – asking God for a bigger church to make a bigger difference; more people knowing Jesus and more justice in the world. Parish ministry is about purpose and focus and intention alongside the privilege of sharing the grief of the bereaved, the broken hearted and the anxious; it is found in the joy of baptisms or weddings, in our worship and celebrations and always on our knees in prayer, alone and with others who share our common faith and our Rule of Life.

Our desire is that all our sisters and brothers who are clergy should flourish in this rich, rewarding and complex priestly ministry. Called to be stewards of the mysteries of God (1 Corinthians 4:1) clergy must steward themselves and all that God has entrusted to us. To flourish in ministry is to be rooted in prayer and personal discipleship, to attend to physical, mental and spiritual needs, to nurture those relationships with family and friends which sustain us, to manage the often blurred boundaries and find a sustainable rhythm in day to day ministry, knowing and working to our priorities.

The paperwork for our MDR scheme helps us focus on these critical questions. It has been updated to align with our Diocesan vision, with our Rule of Life and with the “five numbers” that crystallise our thinking - the challenge to every disciple to bring one friend and to do ten things that serve the common good; the challenge to us all as a body to plant 100 new congregations, encourage 1,000 new leaders and mature 10,000 disciples. On the next page you can read the theological introduction we have drafted for our clergy which sets out our shared understanding of MDR in Liverpool.

The heart of an MDR, the encounter that breathes life and spirit into the structure is the personal, honest, robust and searching discussion between clergy and their Bishop's Reviewer. Bishop Bev and I are deeply indebted to those clergy and lay people who serve in this vital ministry of listening, encouraging, sustaining and challenging clergy. Thank you for all that you do, for the time that you give, most of all for the prayers that you pray.

+Paul Liverpool

1.2 A Theology of Ministerial Development Review

For the grace of God has appeared, bringing salvation to all, training us to renounce impiety and worldly passions, and in the present age to live lives that are self-controlled, upright, and godly, while we wait for the blessed hope and the manifestation of the glory of our great God and Saviour, Jesus Christ. He it is who gave himself for us that he might redeem us from all iniquity and purify for himself a people of his own who are zealous for good deeds. Declare these things; exhort and reprove with all authority. Let no one look down on you. (Titus 2:11-15, NRSV)

The dawning of the grace of God in Christ Jesus, and the doctrine of unmerited salvation by that grace alone, is regularly linked in Scripture with exhortations to personal holiness and effective action. This juxtaposition, and its apparent paradox, is set out most starkly and most clearly in Philippians: *"...work out your own salvation with fear and trembling; for it is God who is at work in you, enabling you both to will and to work for his good pleasure."* (Phil 2:12b,13)

In the wider context of the Church's mission in these days, we believe that the task for us is to embrace a confident urgency, built on trust in God and on a keen awareness of the tasks before us. To embrace this confident urgency is to resist two temptations: first, the temptation to ignore the sovereignty of God and to whip up a furious anxiety based on purely secular models of success; and second, the temptation to sink into a quietist complacency which absolves the Church's ministers of any share in the effective action of God in the world.

MDR takes its place within this theological context. By engaging in the Review we are not appraising one another's job as if we were agreeing a bonus, whether worldly or eternal. Nor are we focused simply on ministerial self-development, as though the role of the Church were no more onerous than to deliver well-rounded clergy into heaven.

No, we are aligning ourselves with the calling and sending God so that we may know the power of the resurrection and may co-operate with our Lord in recognising and welcoming the Kingdom.

When the national guidelines say that the MDR is to be "searching", therefore, the word is to be understood in the full context of that acceptance of grace, training in holiness and zeal for good deeds of which the author of Titus speaks.

We are most grateful to our colleagues who share with us the shaping and delivery of MDR in the Diocese for holding these tensions in their work. And we ask you, as you engage in the process, to hold these tensions too. Thank you for your willingness to do so.

This comes as always with every blessing and with our profound thanks to you for the ministry we share.



1.3 Ministerial Development Review in Liverpool

Ministerial Development Review (MDR) is an annual process for all licensed clergy in the Diocese of Liverpool. It is an aspect of the Episcopal oversight of the Bishop of Liverpool, functioning under his authority and in keeping with the guidelines of the Church of England.

In May 2019 Bishop Paul set out several key principles which underpin the Ministerial Development Review (MDR) scheme within our diocese:

- As the national guidelines make clear, an MDR is expected to be 'searching' and is 'founded on the assumption that all officeholders are responsible to God for the ministry entrusted to them and they are accountable to the Church and to one another for the way it is exercised'.
- As part of their personal discipleship within the Diocesan family, office holders will be expected to have committed themselves to the Rule of Life with its inner and outer journey, interpreted the Rule within their context and life and to encourage their congregations to embrace the Rule as an expression of personal and shared discipleship.
- Office holders are both encouraged and expected to be responsible for their spiritual and personal wellbeing, and for making those necessary demands and requests that will nurture this within the ministry they offer.
- Office holders should continue to reflect on the description of ministry in the Ordinal as well as on the specific hopes and plans of our Diocese, which are encapsulated in the 'five numbers' (Appendix 4).
- The work of each of our office holders should be focused and guided by a Role Description that is realistic, challenging and held under regular review.

For the majority of clergy in our diocese Ministerial Development Review (MDR) is a mandatory requirement but all clergy, save curates,¹ are encouraged to undertake an MDR for all are united in the same call to service. The process is flexible enough to reflect the different contexts in which clergy exercise their ministry.

- For all clergy under Common Tenure MDR is mandatory as set out in legislation² which requires an MDR every two years. In common with many dioceses, in Liverpool MDR is an annual requirement in the belief that this offers a better framework of support, encouragement and accountability.
- Clergy who have retained their freehold and exercise a priestly ministry under licence are strongly encouraged but not required to undertake an annual MDR.
- Clergy employed in Sector Ministry (Hospital, Prison, College Chaplain) but hold the Bishop's Licence undertake an MDR with paperwork adapted to the framing of their ministry, helping them reflect upon aspects of their ministry that might not be covered within their own organisation's appraisal/ performance review systems.³

¹ Curates do not undertake MDR; Assessment at the End of Curacy (AEC) meets the requirements for developmental review.

² The Ecclesiastical Officers (Terms of Service) measure 2009.

³ The adaptation of paperwork to reflect the circumstances of sector ministry will happen during 2020.

- Self Supporting Ministers who hold a licence will also engage with the MDR process to help them regularly reflect upon their ministry within the specific context they find themselves ministering in.⁴

Clergy will normally have a Review in each calendar year. However, first incumbents who have not previously done an MDR and clergy who have moved to a new parish will normally undertake their MDR towards the end of their first year in their new post. Most clergy of incumbent status participate in our twelve month transition in leadership programme, Fresh Start, in their first year in post.

Reviewers are asked to be aware of clergy new in post; there will not be parish or ministry specific objectives from an earlier MDR to reflect upon. The MDR paperwork encourages clergy new in post to discern the emerging priorities and issues in their new ministry and to reflect on their engagement with the Fresh Start programme.

The purpose of Ministerial Development Review is:

- to enable clergy to flourish in their ministry, personally and professionally
- to equip them for ministry in our diocese of Liverpool
- to help clergy reflect on their ministry, their priorities and their role
- to ensure others in their local context understand the clergy role

Therefore, Ministerial Development Review is avowedly not an appraisal system for clergy, nor is it a mechanism for bringing in targets for parishes. Its purpose is solely to help clergy develop in their ministry, and to foster a greater sense of collaboration between clergy and those they serve alongside.

MDR is a confidential process. The discussion is confidential between the Reviewee and Reviewer and the finished paperwork shared only with the Bishop, save one minor element, see the section Final Reflections (2) under para 3.3 on page 13.

2 About Bishop's Reviewers

2.1 Bishop's Reviewers

The role of the Bishop's Reviewer is key in helping clergy to reflect honestly and robustly upon their ministry and discern how they need to develop, personally and professionally, in order to serve God faithfully within their local context. The Bishop's Reviewer helps those who serve God in priestly ministry to answer the question, 'What must I be and do today in order to better serve God tomorrow?'

The role and responsibilities of the Bishop's Reviewer are carried out by both clergy and laity. There are no formal criteria. Reviewers will be committed Christians with a good working knowledge of parish life and the demands of the clergy role and competency to meet the requirements as set out in the Role Description, below.

Many clergy work with the same Bishop's Reviewer over a number of years. Where there is no Reviewer Bishops Lodge will allocate one. Clergy may request a different Bishop's Reviewer when initially allocated and may do so if they feel a change might be helpful, for

⁴ Paperwork for SSM clergy is currently the same as for stipendiary clergy and the context of SSM ministry reflected in the MDR conversation. Work to adapt the SSM paperwork will be undertaken in 2020.

example if the clergy move to a new post. Likewise, a Bishop's Reviewer may decline an initial request or ask for a change from a current MDR arrangement.

Where clergy hold roles with responsibility outside of a parish Bishop's Reviewers are appointed by the Bishop, and will normally be:

Bishop of Liverpool	Arranged by the Archbishop's Council
Diocesan Oversight Team	Bishop of Liverpool / Bishop of Warrington
Area Deans	Their Archdeacon
Healthcare Chaplains	The Bishop of Liverpool's advisor for Healthcare Chaplains
Cathedral Clergy	The Dean

MDR oversight

Oversight of the Bishop of Liverpool's MDR scheme lies with a small implementation group chaired by Ven. Pete Spiers, Archdeacon of Knowsley and St Helens. The implementation group reviews the scheme regularly, monitoring the administration of the scheme, reviewing paperwork and process, identifying issues arising from clergy feedback and arranging for MDR training opportunities

Day to day management of the MDR Scheme is undertaken by the Office at Bishop's Lodge. Operational oversight lies with the Bishop's Officer for MDR within Lifelong Learning at St James' House. The MDR Officer is responsible for:

- overseeing the system for MDR in the diocese;
- advising on the appointment of Bishop's Reviewers;
- ensuring that appropriate training and information is provided for Bishop's Reviewers and those being reviewed;
- being available to discuss the scheme with clergy.

Contacts

- Ven Pete Spiers, Chair of the Implementation Group:
pete.spiers@liverpool.anglican.org
- Steve Pierce, Bishop's Officer for MDR at St James' House
steve.pierce@liverpool.anglican.org
- Nichola James, MDR manager at Bishop's Lodge
bishopslodge@liverpool.anglican.org

2.2 Role Description and appointments

General Responsibilities

- To lead and facilitate the Review process for each Reviewee.
- To ensure the Review process affirms and encourages ministry, sets clear and SMART (Appendix 5) objectives and identifies required support, challenge and development.
- To seek out and respond to regular feedback from Reviewees and from other Bishop's Reviewers of their own practice as Reviewers.
- To work with and seek support from the MDR lead within Lifelong Learning, Archdeacon's and MDR administration at Bishop's Lodge, should there be issues during the Review process.
- To maintain appropriate confidentiality during and after the Review process.
- To undertake initial and ongoing diocesan training to support the role of Bishop's Reviewer including attendance at least one Bishop's Reviewer training session a year.

Key Skills required

- To manage the administrative tasks in making arrangements for a Review discussion and working to the timetabled process.
- To offer guidance and advice as needed to facilitate appropriate choices of people for the Listening Exercise depending on which method is used.⁵
- To engage in active listening in order to hear what is being said during the Review discussion. Active listening skills include:
 - working with the agenda of the Reviewee and not their own agenda;
 - distinguishing between words, tone of voice and body language;
 - summarising, paraphrasing and reflecting what the reviewee has said in order to ensure clarity and understanding;
 - understanding the gist of the Reviewee's reflections and to enable them to identify areas of struggle, lament and celebration;
 - asking questions that reflect an understanding of the Reviewee's perspective;
 - asking questions that evoke discovery, insight, commitment or action (e.g., those that challenge the assumptions of the Reviewee);
 - asking open-ended questions that create greater clarity and possibility for new learning;
 - asking questions that move the Reviewee to look forwards, not to justify the past or look backwards;
 - being clear, articulate and direct in sharing and providing feedback;
 - use language that is appropriate and respectful to the Reviewee.
- To demonstrate empathy and encouragement to the Reviewee.

Appointments

Bishop's Reviewers will be appointed by the Bishop following a recommendation from the Bishop's MDR Officer within Lifelong Learning. They are appointed for three years, renewable for a further three years by the Bishop after consultation and they are expected to make it a priority to attend at least one training session a year.

⁵ See Appendix 2 for guidance on the listening exercise

Training and development

There is no fixed, formal programme of training; Bishop's Reviewers will draw on their professional skills and, for clergy, personal experience of undertaking MDRs. However, there are some building blocks for training:

- Shadowing an experienced Bishop's Reviewer, sitting in as an observer in an MDR on at least one occasion, ideally two or three.
- Attending the one day *Effective Conversations* training, offered in partnership with 3D Coaching on using and developing coaching skills in MDR discussion.
- Again with 3D Coaching a further three or four day's coaching training is available over the first twelve months in role as a Bishop's Reviewer.
- Bishop's Reviewers will be invited to one or two MDR Bishop's Reviewer training events each year to share with others and develop their skills.

Expenses

The Reviewee should normally travel to see the Bishop's Reviewer where possible. There is value in a conversation away from the usual working environment and the possibility of interruptions of various kinds. In exceptional circumstances, Bishop's Reviewers, lay and ordained, can claim travel expenses at the normal diocesan rate of 40p per mile. Please contact the Bishop's Officer for MDR to discuss.

3 The Ministerial Development Review Process

3.1 Preparation for the Review: the initial planning conversation

Clergy are allocated a Bishop's Reviewer by the MDR manager at Bishop's Lodge and will in many cases stay with that Reviewer for a good number of years. However, as above, both Reviewee and Reviewer can request a change via Bishop's Lodge.

When an MDR is due both yourself as Reviewer and your clergy colleague will be notified by email from Bishop's Lodge. The clergy email will include your contact details as Reviewer and your clergy colleague should make initial contact with you. Your initial planning conversation should:

- agree the date and time of the MDR Review discussion. The recommended time for the Review discussion is 1.5 to 2 hours.
- discuss the method used to obtain feedback for the Listening Exercise and the selection of those who will be invited to participate (see Appendix 2).
- agree the date by which you will receive the completed draft of the Clergy Preparation and Summary document prior to the MDR discussion.
- ensure that along with the Clergy Preparation and Summary Document your clergy colleague will also send you their *objectives only from the previous year's MDR, even if this MDR was conducted with a different Reviewer*. Reviewers will not retain MDR documentation once the paperwork has been signed off and sent to Bishop's Lodge. The objectives are sent by way of a reminder or to inform a new Reviewer.

Following this initial discussion, clergy will then let Bishop's Lodge know the date of the MDR meeting; they must do so **within four weeks** of the initial email from Bishop's Lodge. If the MDR date is not communicated within the four weeks, clergy will receive one reminder with a two-week deadline. If Bishop's Lodge do not receive a reply the MDR manager will contact with the clergy to discuss the delay.

Once the date of the MDR has been communicated to Bishop's Lodge your clergy colleague will first begin the process of asking folks to contribute to the Listening Exercise and secondly set aside time to prepare their MDR paperwork.

Clergy in their first incumbency with no previous MDR or those who have moved to a new post of incumbent status since their last MDR (in Liverpool or another diocese) will normally undertake an MDR towards the end of their first year in a new parish. For most clergy this will be towards the end of their time on Fresh Start, a transitions in leadership programme for clergy moving to a new post of incumbent status.

3.2 Before the Review discussion

In preparation for the MDR Review clergy are asked to set aside time for thoughtful, prayerful reflection, informed by a number of key documents which are listed below. As Reviewer please give these documents careful and prayerful consideration.

- **The Ordinal:** the text of the ordinal can be found in Appendix 3. Clergy are encouraged to re-read the Ordinal in light of their last 12 months in ministry and reflect on any phrases that especially resonate and why. Your reading of the Ordinal will help understand the wider context for the specific phrases drawn out by the

Reviewee and you may be able to draw on other phrases during the discussion, as appropriate.

- **Objectives from last year's MDR:** as above, these objectives will be sent to you by clergy from their last MDR. Clergy colleagues are encouraged to reflect on what to celebrate, has gone well; what has been a cause for lament, has not worked or proved frustrating; where there might be growth. Have objectives been achieved and what remains to be done and perhaps why some things have not been achieved? Clergy new in post will not be able to reflect on a previous MDR but will consider what seems to be emerging as significant in this first year of a new chapter of ministry
- **Diocesan vision and strategy:** Clergy are encouraged to consider their last year in ministry in light of our diocesan vision and aspirations as set out in the 'five numbers' and the Bishop's Rule of Life. These can be found in Appendix 4. For clergy who have taken up a new post in recent years the Rule of Life and 'five numbers' will be embedded in their Role Description.
- **Role Description:** recently appointed clergy will have a fairly current Role Description. Older Role Descriptions may not include our diocesan aspirations and may no longer reflect the current patterns and priorities of ministry. Some clergy may have no Role Description. The Role Description should be reviewed annually and may be updated to reflect important changes in the ministry of the parish priest and the context of that ministry, including wider responsibilities in the diocese. Significant changes to the Role Description should be agreed with the church wardens in consultation with the PCC, in a team ministry with team clergy, with the area dean and signed off by the Archdeacon.

Role Descriptions are vital to help manage the blurred boundaries and pastoral, liturgical and missional priorities of parish ministry. Revising the Role Description may be an appropriate action arising from the MDR. But do be careful not to let the Role Description become the focus of the MDR discussion

The Listening Exercise (Appendix 2)

If Method One for the Listening Exercise is used you will not see papers from the 360 feedback. Instead clergy will review the Listening Exercise feedback and work it into the Clergy Preparation and Summary Document.

However, under Method Two contributors to the Listening Exercise will send their comments direct to the Bishop's Reviewer for you to reflect upon. Make notes about anything that you think might need to be addressed during the discussion. What themes might have emerged, what questions are prompted by the feedback? Think about how to bring the feedback into the Review discussion. In particular think through how to most usefully include the negative or more challenging/difficult feedback. Anticipate possible responses from the Reviewee and how you will respond to that in order to facilitate a constructive conversation.

A third method, a round table discussion, is a further option; see Appendix 2.

3.3 The Clergy Preparation and Summary Document

This document, prepared by your clergy colleague and submitted to you by the date agreed prior to the MDR, is critical. It is the primary focus of your MDR conversation and comprises of three main parts.

Reflection on your Ministry

The first section, titled *Reflection on your Ministry* is itself in two parts. The first part of this section asks the question, *Where are you now?* Here clergy should briefly *summarise* their ministry this past twelve months or so, should capture the key elements of that thoughtful, prayerful reflection on the documents listed in 3.2 above.

This summary should give the Reviewer a sense of how the last year has been for your clergy colleague. Do not dwell but do allow this section to provoke some discussion:

- anything that invites further exploration ('can you tell me more about...?').
- anything that needs affirmation, celebration, acknowledgment or lament that is not picked up in the rest of this section.
- anything that you can read 'between the lines' which may be helpful to discuss?
- anything that might arise from the feedback in the listening exercise.

The first part of this section summarises the past year; the second part *crystallises* some key items arising out of the reflection in preparation for the MDR. Titled, *Where do you hope to be?* clergy are asked to identify three or four key matters they wish to focus upon in the MDR conversation. Allow time for discussion around these identified elements.

Looking forward

The second main section of the Clergy Preparation and Summary Document is titled *Looking Forward*. It focuses on objectives for the coming year which are considered under four headings. The order of the headings is intentional but go where your conversation takes you and there will be some interplay between the different headings:

- staying healthy in ministry, physical and mental self-care and wellbeing; sustaining the relationships that nurture and managing the often blurred, permeable boundaries of ministry.
- sustaining and developing the spiritual life and priestly ministry, incorporating the diocesan Rule of Life within this, summarised in Appendix 4.
- objectives for the breadth and depth of local church life and ministry, discerned in light of diocesan hopes and plans encapsulated in the 'five numbers' including making and growing disciples, new leaders or new worshipping communities.⁶
- consideration of any wider aspects of your colleague's ministry not covered by the other objectives. For example, there may be particular gifts or skills to offer and develop, particular areas of service either within or outside the immediate ministry context that will encourage and enhance personal and professional development.

Please note that the objective headings are sub-divided into 'a' and 'b' sections. The 'a' sections are for clergy to jot down short notes as they prepare or as they arise in the early parts of the MDR conversation. The 'b' sections are the focus of the MDR conversation. This where objectives are drafted which address the issues and which are also SMART: Specific, Measureable, Achievable, Realistic and Time-set.

⁶ A revised Archdeacons Parish Review (APR) process is under development. If an APR has raised important and specific issues for the church and clergy to address it will be appropriate to capture that here.

Thus, by way of example, a colleague might note under 1a (health and wellbeing) their intent to 'do more reading'. The challenge for both clergy and Reviewer in section 1b is to make this intent a SMART objective, to know *how* this can be done. For guidance on SMART objectives please see Appendix 5.

In short, this section presents a twofold task for the Bishop's Reviewer:

- First, is there a depth, breadth and robustness about the elements identified and discussed under each of the four headings in this section?
- Second, are the objectives as developed in the 'b' sections during the MDR conversation genuinely SMART? Do they enable clergy to be accountable, both to themselves and to trusted others, such as a spiritual director and, of course, the Bishop's Reviewer? Do they enable personal and professional development?

Final Reflections

The third and final section of the Clergy Preparation and Summary document is short and straightforward:

1. Ensure that your clergy colleague has noted here all the retreat, training and ministerial development undertaken in the previous year within and outside of any diocesan provision.
2. Explore whether there are any training needs or opportunities in light of the objectives set in the previous section. Any request for study leave, Bishop's Bursary application or Reading Week etc. should sit here. Please don't make promises and do manage expectations here. Furthermore, please be aware and remind your clergy colleague that this is the *only* section of the MDR paperwork that is not confidential. Any requests in this section only will be extracted and will be shared with Lifelong Learning through the Bishop's Officer for MDR at St James' House to inform clergy continuing development training.
3. Clergy will meet with one of the Bishops around six months after the MDR for a follow up discussion. In this section encourage clergy to note any significant issues from the MDR discussion which they would like to discuss with the Bishop in confidence. On occasion there may be some urgency and a request for an earlier meeting with the Bishop.

3.4 The Review Discussion

Remember your role as Reviewer is to facilitate their reflection, learning and identification of priorities looking forward. You will want to create a relaxed and open environment – it is important that you convey a relaxed and open presence and that you can be sure you will not be interrupted.

During the Review discussion

During the Review discussion you should aim for a CLEAR process; **c**ontract, **l**isten, **e**xplore, **a**ction and finally **r**eview. In partnership with 3D Coaching the diocese of Liverpool offers all MDR Reviewers and many others training in coaching skills to enhance MDR conversations. The CLEAR process is a key and helpful element of that training.

Contract. It is important to set the contract for the MDR discussion. You have agreed the time and duration for the discussion, the Reviewee has identified issues that they wish to discuss in the draft Clergy Preparation and Summary Document. It will be important to first check if these are still the issues that will form the bulk of the discussion.

Ask the Reviewee what they would like to achieve by the end of the discussion and how they might know they have achieved it.

You might ask them how they would like you to work with them. Some Reviewees may simply just want to talk for a while and see what emerges from the conversation; others may want you to question them much more.

Finally agree where the Reviewee would like to start.

Listen. Your discussion needs to be *forensic* and to help the Reviewee to probe more deeply. The skill of the Reviewer is to encourage deep reflection and learning without the conversation becoming one of counsellor or spiritual director. The conversation will be about doing and about being, and this tension can be difficult to navigate.

During the discussion listen carefully, looking out for feelings expressed overtly or below the surface of the conversation and make safe space for these to be expressed and explored. Be aware of your own emotions, which you may need to keep in check during the discussion so as to be of greatest help to the Reviewee.

Explore. Invite the Reviewee to reflect with you by using simple questions and making space for further thinking, reflection and learning. Look out for themes, for opportunities to comment on positives that may be missed by the Reviewee who is much closer to the story than the more objective Reviewer. Don't take things at face value, follow through and probe to get to underlying points, to what may be the more significant elements buried underneath the initial comments.

Action. Do they know what they need to *do* in response to the issue you have spoken about? You are encouraging the Reviewee to identify actions that will get them to where they feel they need to be. It is sometimes useful to ask, 'so what is the first thing you need to do?' or 'so, what can you do now?' As above, your conversation should help make the objectives settled upon SMART objectives (Appendix 5). Agree the objectives and what or who will help clergy to achieve them.

Review. In the last 10-15 minutes of your time together it is worth reviewing the discussion. Let the Reviewee know that you have a small amount of time left and that you want to check if the discussion has achieved what they had hoped it might. Did you have the opportunity to discuss all of the issues that were raised? If not, do they still need to be discussed and where / who might the Reviewee go to have that discussion. It will also be useful to review any objectives and action points that have been agreed.

At the end of the discussion agree with your clergy colleague when the Clergy Preparation and Summary document will be written up after the meeting and sent to you for signing off and for the clergy then to forward to Bishops Lodge.

3.5 After the Review

After the MDR conversation your clergy colleague should make time to tidy up and complete the paperwork and then forward it to you. On receipt check that the write up is an accurate reflection of the MDR conversation.

On occasion you may wish to clarify a point, suggest an additional item or request some changes to the document. It is important that the final Review document accurately reflects the discussion.

If you are happy with the write-up please sign it off. Electronic copies are perfectly acceptable; simply type your name and the date on the document and return by email with a brief covering note confirming you are happy with the final paperwork.

Dealing with the paperwork

Once the Review document has been signed and returned you must delete your copy of the paperwork; there is no need to retain it. The following year the objectives only will be sent to you as an *aide memoir* with the preparatory paperwork and the listening exercise feedback.

Clergy retain their own personal copy and will send a copy to Bishops Lodge. Exceptionally you may agree with your clergy colleague to retain the paperwork for a specific purpose and for an agreed time frame. Clergy must return the completed paperwork to Bishops Lodge within four weeks of the MDR discussion.

Meeting with the Bishop

Soon after the MDR forms are received by Bishop's Lodge the Reviewee will be offered an interview with a Bishop which will take place approximately 6 months following their MDR. The aim of the meeting is to provide an opportunity for discussion of any issues that have arisen and to review the objectives that were set during the MDR discussion. If the Reviewee would like or needs that meeting to be sooner than six months please make sure that this is recorded on the MDR form.

APPENDIX 1 An overview of the MDR Process

Step One: Bishop's Lodge will contact clergy and their Bishop's Reviewer, sending the Clergy Preparation and Summary Document, the Reviewee Handbook and Listening exercise forms.

Step Two: Clergy make contact with their Bishop's Reviewer for a brief initial planning discussion: agree a date for the review discussion, contributors and process for the listening exercise and the date that the preparation document and last year's objectives are to be sent to the Bishop's Reviewer before the Review.

Step Three: Clergy inform Bishop's Lodge of the date of the MDR meeting within four weeks of initial contact.

Step Four: Clergy reflect and prepare their Preparation and Summary Document, sending it to their Bishop's Reviewer with the objectives only from last year's MDR by the agreed date.

Step Five: The Review discussion takes place.

Step six: Following the discussion, clergy write up the Clergy Preparation and Summary Document, sending a copy to the Bishop's Reviewer to check, sign and return to the clergy. The Bishop's Reviewer deletes their paperwork; clergy retain a personal copy and forward the final copy to Bishop's Lodge.

Step Seven: Once the documents have been received by Bishop's Lodge they will be sent to the appropriate Bishop. Clergy will be contacted to arrange an episcopal conversation to take place approximately six months after the MDR discussion. Any training requests (Final Reflections, section 2 only) will be extracted and separately sent to Lifelong Learning. Paperwork remains confidential to the clergy, the Bishop's Reviewer and the Bishops.

APPENDIX 2 Guidelines for the Listening Exercise

The listening exercise is a key part of the Ministerial Development Review process. The aim is to invite helpful feedback from those the Reviewee is called to serve. For this to be helpful there should be a balance of positive feedback and constructive comments on areas of potential growth.

The initial email from Bishop's Lodge will include a Listening Exercise Feedback Form which clergy will pass to all those who agree to contribute to the MDR Review.

Feedback can be obtained in **one** of three methods which are detailed below. In the initial conversation to set up the MDR meeting with your clergy colleague you should discuss which method for gaining feedback should be used. Bishop's Reviewers should check that there is indeed a range of perspectives in the feedback sought and offered. The Review discussion may include some thinking on who it might be helpful to be invited to contribute the following year.

Inviting contributors to the Listening Exercise:

Feedback works best when it is open, honest and timely. Therefore, for the listening exercise to be of maximum value, it is important that those individuals who contribute feel free to give honest feedback. Three models are offered which address confidentiality in different ways. Under Method One chosen contributors to the listening exercise share their written feedback only with the reviewee; under methods Two and Three contributors share their observations with you as Reviewer and you reflect back to your clergy colleague in the MDR discussion or if you prefer in written summary before the MDR. The exact method for gaining feedback should be discussed during the initial conversation when setting up the MDR meeting.

In preparation for each Review, clergy will invite between 3 and 5 people to contribute to the Listening Exercise. Contributors are asked to comment from their own experience of the clergy person's ministry, in particular on the clergy person's specific gifts and contribution over the last year, and areas for potential development.

Two or three people will be from within the church community; for example, a Churchwarden, the leader of the Sunday School, a Reader, a committed and involved member of the church, a person from the PCC. One or two should be people from outside the church community, for example staff from the local school or a local councillor. Feedback should be sought from people encountered across different aspects of clergy ministry and they are asked to comment on the aspects of ministry with which they are familiar.

Please note that depending upon the clergy role certain people should always be asked to be a contributor:

- A training incumbent should include feedback from a curate;
- An incumbent should include one of any assistant clergy (e.g. self-supporting, retired and assistant ministers)
- A team vicar should include the team rector
- A team rector should include one team vicar.

Method One:

Once possible contributors have been identified clergy will ask them to complete a Listening Exercise form. This form is returned to the clergy who will reflect upon it and seek to capture the substance in the Preparation and Summary Document. Under Method One as Bishop's Reviewer you may not see the listening exercise feedback although some clergy may choose to forward the papers to you. More often you will invite comments on and responses to the substance of the Listening Exercise from your clergy colleague. Under this method clergy will know who has sent the feedback and the contributor will be aware of this.

Method Two:

Contributor feedback is gathered in the same way as Method One but feedback forms are returned directly to you as Bishop's Reviewer. You should collate the responses and consider what aspects might most helpfully be shared within the MDR discussion. Under this method clergy will know who is providing feedback but not necessarily who has fed back specific comments.

Method Three:

This method is quite different and more time consuming but also offers significant insights. Using this round table method, contributors to the Listening Exercise are invited by your clergy colleague to a meeting with you (but not your clergy colleague) and you facilitate a discussion based around the questions on the Listening Exercise feedback form. The discussion is based on the forms but contributors to the Listening Exercise do not need to complete the forms in advance of the discussion.

Your initial discussion with your clergy colleague would consider this whether this round table method might be helpful. Your clergy colleague would not be present so you should prepare a summary of the points raised in the meeting which will contribute to the MDR reflection and discussion.

APPENDIX 3 The Ordinal

Priests are called to be servants and shepherds among the people to whom they are sent. With their Bishop and fellow ministers, they are to proclaim the word of the Lord and to watch for the signs of God's new creation. They are to be messengers, watchmen and stewards of the Lord; they are to teach and to admonish, to feed and provide for his family, to search for his children in the wilderness of this world's temptations, and to guide them through its confusions, that they may be saved through Christ for ever. Formed by the word, they are to call their hearers to repentance and to declare in Christ's name the absolution and forgiveness of their sins.

With all God's people, they are to tell the story of God's love. They are to baptize new disciples in the name of the Father, and of the Son, and of the Holy Spirit, and to walk with them in the way of Christ, nurturing them in the faith. They are to unfold the Scriptures, to preach the word in season and out of season, and to declare the mighty acts of God. They are to preside at the Lord's table and lead his people in worship, offering with them a spiritual sacrifice of praise and thanksgiving. They are to bless the people in God's name. They are to resist evil, support the weak, defend the poor, and intercede for all in need. They are to minister to the sick and prepare the dying for their death. Guided by the Spirit, they are to discern and foster the gifts of all God's people that the whole Church may be built up in unity and faith.

- Do you accept the Holy Scriptures as revealing all things necessary for eternal salvation through faith in Jesus Christ?
- Will you be diligent in prayer, in reading Holy Scripture, and in all studies that will deepen your faith and fit you to bear witness to the truth of the gospel?
- Will you lead Christ's people in proclaiming his glorious gospel, so that the good news of salvation may be heard in every place?
- Will you faithfully minister the doctrine and sacraments of Christ as the Church of England has received them, so that the people committed to your charge may be defended against error and flourish in the faith?
- Will you, knowing yourself to be reconciled to God in Christ, strive to be an instrument of God's peace in the Church and in the world?
- Will you endeavor to fashion your own life and that of your household according to the way of Christ, that you may be a pattern and example to Christ's people?
- Will you work with your fellow servants in the gospel for the sake of the kingdom of God?
- Will you accept and minister the discipline of this Church, and respect authority duly exercised within it?
- Will you then, in the strength of the Holy Spirit, continually stir up the gift of God that is in you, to make Christ known among all whom you serve?

APPENDIX 4 Diocesan Vision and Rule of Life

Our *vision* is clear:

**We are asking God for a bigger church to make a bigger difference:
more people knowing Jesus, more justice in the world.**

Our *plans and prayers* to realise this vision centre on five numbers.

Two numbers apply to each one of us as disciples/followers of Jesus.

Three numbers apply to people in leadership roles in the Church, tasks we share together.

Disciples – all of us

1: Bring one friend

Bring one friend each year into the worshipping and serving life of the church.

10: Do ten things

Enact ten acts of service or points of connection each year that change the world for the better.

Leaders – some of us

100: Plant a hundred new congregations

Plant a hundred new congregations which draw new people into the worshipping and serving life of the church (over the next 10 years)

1,000: Grow a thousand new leaders

Identify and nurture a thousand new leaders in the worshipping and serving life of the church (over the next 5 years)

10,000: Build a body of ten thousand disciples

Encourage the first ten thousand people to commit themselves to the Rule of Life (over the next 3 years)



Rule of Life



As a leader in the Diocese of Liverpool you have agreed to live your life according to our rule of life. To live such a life is to be a disciple.

If we ask God for a bigger church to make a bigger difference, and want to see more people knowing Jesus and more justice in the world, then God will answer our prayer is by making more disciples – and including us in that number.

Being a disciple on the Rule of Life means being on an inner journey – to Pray, Read, Learn; and an outer journey – to Tell, Serve Give.

When we take the inner journey we respond to God's call, and we are not alone



In prayer, as Jesus tells us, we enter the secret place to meet the One he called Father, who draws us close, who sees what is done in secret, who fills us with life.



In reading the Bible we meet the inspired writers who point us to God, and we meet those who have interpreted their words over the centuries so that we can read with love and understanding.

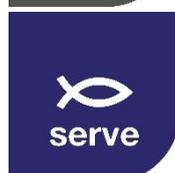


In learning the faith we meet the people God has given us in the church, parish, school, fresh expression or chaplaincy; we meet them and learn from them how to live

When we take the outer journey we respond to God's sending love, and we are not alone



In telling of Jesus we meet our friends who do not know him, as one by one we bring them to meet him for themselves, to know his love for them, and to be led by Him to his Father, their Father.



In serving others we meet their needs as we meet the people themselves, connecting with them in the struggle for justice and dignity, doing the many things God gives us to do with and for them to help and love them more.



In giving our lives we take our place among the hundreds of millions of people who bear the name of Christ worldwide, and among the more than sixty thousand people who are actively connected to our diocese.

For more information and support to follow the Rule of Life sign up at www.ruleoflife.org.uk

APPENDIX 5 Setting SMART Objectives

The latter part of the discussion involves the setting of objectives for the coming year. This is not simply a business planning exercise, but an opportunity to listen to God and reflect upon what He may be saying about the development of ministry for the future.

Because everything we do is ultimately an expression of “the hope that is in us” (1 Peter 3.15) it is important to remember that planning and the setting of objectives leave room for God to change, challenge and surprise us. Intercessors are those who pray as well as plan the future into being and our strategic initiatives should always make space for the energies of God and the outpourings of the Spirit (Romans 12.4) that foster virtue, hope and justice.

During your conversation, you will need to ensure there is enough time for a full discussion about the objectives and be sure to consider what has emerged in the conversation. You might want to keep a running list during the discussion of possible objectives and this might act as a starting point once you are deciding on objectives, or which can be added to their list.

Remember to ensure that at least one objective is about the well-being of your clergy colleague who is encouraged to start by identifying this particular objective.

Good objectives are SMART. For the objectives to be of greatest use it is important that they are:

Specific
Measurable
Achievable
Realistic
Time set

Is the objective specific?

The objective, *‘Get the church to think about mission in the coming year’* is not specific and is really rather vague. It might be better to try to define what specifically about mission might the church think about. What might the Church focus upon? Are clergy colleagues planning to talk about mission or engage in mission activity? It might be better to write such an objective as:

*‘Preach two sermons in May about God’s Mission’ or
‘Talk with the PCC in June with a view to setting up a Mission Shaped Church course for next autumn’.*

Is the objective measurable?

The alternatives given above are measurable and it is easy to know if clergy have preached the sermons or spoken to the PCC and set up the course for the following autumn.

Is the objective achievable?

With the original objective it would be possible to do almost anything related to mission in the coming year and so achieve the objective. However, how will clergy know if they have achieved what they wanted to achieve when mission was first identified as an objective?

Is the objective realistic?

The objective needs to be realistic within the time and resources that are available. However, room must be made for the God of miracles to surprise us! Is God calling clergy to set an objective that stretches their faith and perhaps the faith of the church?

Does the objective have a time frame?

The objective should be time-specific as far as possible. A year is a long time, and if we allow a year to achieve something it is always easy to put it off. Also, some objectives may be so big that they would need to be broken down into a series of smaller steps, each with their own time frame. For example:

'Try to get more time for personal study and family life in the next year'.

It might be better to try to identify a series of smaller steps such as;

- Within the next month: To set Friday as my day off and to let the PCC and congregation know.
- Within the next month contact Lifelong Learning to discuss the arrangements for study leave to be taken next year.
- Discuss with my family our next holiday and book it within the next two months.
- Select and purchase one new book dealing with developments in Old Testament theology within the next month.
- Identify and schedule 2 hours a week in my diary for the next 3 months to read and think about the contents of the book.

Once the objectives for the coming year have been agreed and made SMART your clergy colleague will write up their rough notes made in the meeting and prepare a final version of the Clergy Preparation and Summary Document to send to you for sign-off.

Just as a long journey starts with a single step, it is worth identifying what steps to take first. This should be included on the form.

It is helpful to identify who, if anyone, clergy should talk to or seek advice from in helping you to achieve your objectives.

APPENDIX 6 Resources

The following is a summary of some of the resources available to clergy within the diocese of Liverpool and in the wider church. For more information and additional resources contact the Bishop's MDR Officer at St James' House; see page 7 for contact details.

Ministry in transition

Diocesan clergy support in Liverpool seeks to focus especially on key transition points in ministry:

- **Fresh Start** is a 'leadership in transition' programme, normally a Bishop's requirement of all who move to a new post in Liverpool, whether an appointment from within or from another diocese. The programme provides a blend of speaker input on key themes such as conflict, change, resilience, leadership and discipleship with peer discussion, support and encouragement.
- **First Base** is a 'nuts and bolts' programme for first incumbents, run in collaboration with the dioceses of Manchester and Chester. It addresses the more technical issues of governance, finance, buildings, occasional offices and planning and chairing meetings with a retreat day focusing on wellbeing and sustaining priestly ministry.
- **Mid-Ministry**: a programme currently aimed at a demographic of clergy aged c50 and over who have served 10 years in ministry and have 7, 10, perhaps many more years of service ahead. It is offered each autumn by Scargill House in partnership with the northern dioceses (www.scargillmovement.org). The programme assists reflection on our vocational journey and the shape of future ministry.
- **Pre-retirement**: again offered in partnership with Scargill House this is an annual programme exploring the practicalities of retirement, the adaptive change and challenges retirement can bring and the possible shape of ministry in retirement that honours retirement. Support is also offered by the Bishop's Retirement Officers, Rt Rev Geoff Pearson and Rev Bill Forster.
- **Leading your Church into Growth (LyCiG)**: part of the 'trellis of support' for clergy in the first years of a new appointment and available for all clergy, this tried and tested resource helps clergy to work with lay leaders to work intentionally for growth in the local congregation. Under the episcopal lead of the Bishop of Warrington LyCiG is headed up in Liverpool by Rev Neil Short.

Other resources

- **Cognacity resilience days**: in partnership with the St Luke's Foundation every 12-18 months the diocese offers a full day's training exploring resilience and well-being facilitated by Cognacity (www.cognacity.co.uk).
- **Reflective Practice Groups**: often flowing out of Cognacity training and again in partnership with St Luke's the diocese runs one or two reflective practice groups at any given time. These groups are between 6 and 10 clergy meeting together monthly for two years and facilitated by a skilled counsellor and facilitator.
- **Coaching**: in partnership with 3D Coaching the diocese offers training in coaching skills, initial one day training and the option for more intensive 3 or 4 day programme to develop coaching skills to enhance our conversations, pastoral care, vocational and those sometimes difficult conversations.
- **Professional development**: Liverpool makes provision for a small Diocesan Training Grant each year towards professional development and an annual retreat in line with the requirements of Common Tenure. A Bishop's Bursary can be applied for

in pursuit of specific courses or programmes of study and we are committed to 'sabbaticals', properly termed study leave provision for clergy.

- **The Sheldon Hub:** a ministry of the Society of Martha and Mary, the Sheldon Hub is an excellent online resource focusing on issues of wellbeing and resilience.
www.sheldonhub.org
- **St Luke's Foundation:** the ongoing ministry of the old St Luke's Hospital for the clergy again focusing around wellbeing and sustaining oneself in ministry.
www.stlukesforclergy.org.uk