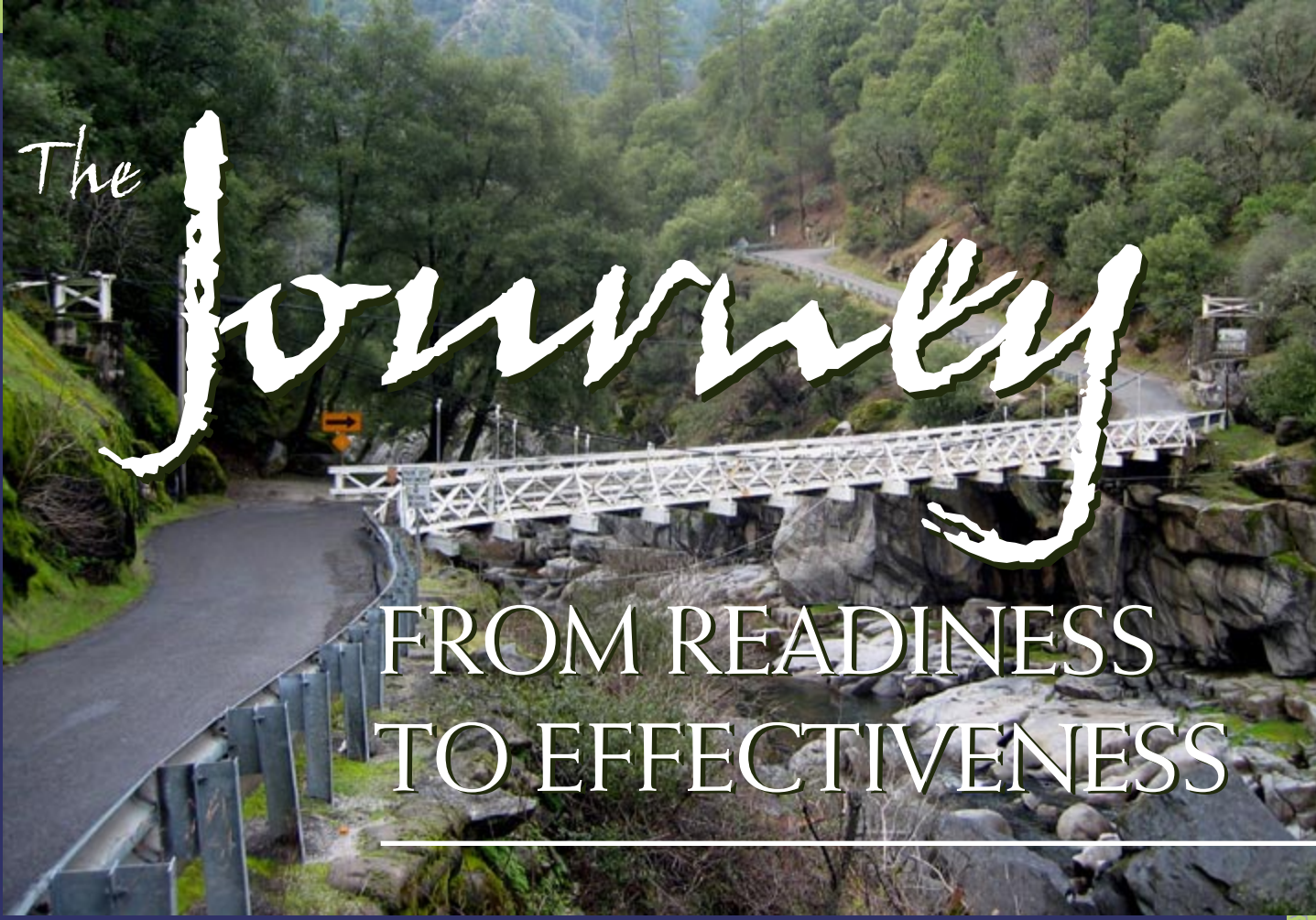




The Journey

FROM READINESS TO EFFECTIVENESS

**An Ongoing Survey of the Probationary Process
in
The United Methodist Church**

Second Edition
2005

LOVETT H. WEEMS, JR.

The Journey

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by Lovett H. Weems, Jr.

A research project conducted in cooperation with the Division of Ordained Ministry, General Board of Higher Education and Ministry of The United Methodist Church, and Annual Conference Boards of Ordained Ministry through a grant from the Lilly Endowment, Inc. to Saint Paul School of Theology for its Program to Improve the Quality of Congregational Pastoral Leadership. This survey and report were done collaboratively with the G. Douglass Lewis Center for Church Leadership at Wesley Theological Seminary in Washington, DC.

SUMMARY OF THE FINDINGS

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SUMMARY OF THE FINDINGS

The purpose of this research project is to help United Methodist annual conferences develop probationary programs more likely to assure that probationers move from readiness for ministry at the beginning of the probationary period to effectiveness in ministry by the end of the period. The method was to learn from the experience of those who have gone through the new probationary process. Findings are based on survey results from those ordained in 2002 and 2003. A similar previous survey was conducted with those ordained in 1999, 2000, and 2001. The findings in the current survey are consistent with those reported in 2003 based on the previous survey.

The **establishment of trust** among all participants is foundational for a positive and formative probationary experience. The **quality of the leadership** of the various components of the probationary process is critical. This is most true for mentors. Selection of the right leaders for the right tasks is essential, along with more adequate training. Probationers most want and expect those functioning in any type of supervisory or mentoring role to be caring, available, and accountable. Probationers want the probationary process to engage and utilize their **practical** ministry experiences during those years. Establishing a community of supportive **relationships** is seen as one of the most significant results of the probationary years.

Of the four recommended components of the probationary process, **mentoring** ranks high in contribution to probationer growth and success and was, for many, the most important dimension of the probationary process. The right match of mentor and probationer, frequency of meetings, and a focus on previously agreed upon ministry topics characterize successful mentoring. One-on-one mentoring and mentoring through groups both seem to work. Participation in a **covenant group**, increasingly available in conference probationary programs, is appreciated. The most important factor determining the covenant group's impact on probationer growth was the quality of group facilitation. Groups that combine spiritual formation practices with discussion of ministry topics seem most successful. **Supervision** is the most consistently present component of the probationary process, yet ranks last of the components in the extent to which it contributed to probationer growth. Continued satisfaction with **continuing theological education** is present so long as it focuses on practical issues of ministry and does not repeat seminary work.

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BACKGROUND

In 1996, the General Conference of the United Methodist Church approved a new probationary process of at least three years for candidates seeking ordination in the denomination. Under the new legislation, a candidate seeking ordination would be commissioned following the completion of educational and other requirements. The commissioned minister then enters a probationary period of at least three years under the supervision and guidance of the person's annual conference board of ordained ministry.

The concept of a probationary period was not new in United Methodism. In 1996, the standard probationary period was two years. A major emphasis of the advocates of the 1996 legislation was that of a "new" understanding of the probationary period, not merely the adding of an additional year to the current probationary period.

A key component of the new understanding of the probationary process was found in what was expected to take place during the three or more years of probation. The current (2004) *Book of Discipline of the United Methodist Church* describes the probationary process as follows:

¶ 326. *Probationary Service of Commissioned Ministers* - All persons who are commissioned ministers shall be appointed by a bishop (¶ 430) and serve a minimum of three years following the completion of education requirements for full connection as a probationary member of the annual conference. During the probationary period, arrangements shall be offered by the board of ordained ministry for all commissioned ministers to be involved in a curriculum that extends theological education by using covenant groups and mentoring to support the practice and work of their ministry as servant leaders, to contemplate the grounding of ordained ministry, and to understand covenant ministry in the life of the conference. The specialized service of probationary members shall be evaluated by the district superintendent and the board of ordained ministry in terms of the probationary member's ability to express and give leadership in servant ministry.

The General Board of Higher Education and Ministry through its Division of Ordained Ministry was charged with establishing the recommended guidelines for annual conference boards of ordained ministry to use in developing their respective probationary programs. *Principles and Guides for Annual Conferences* recommends four dimensions – supervision, continuing theological education, mentoring, and covenant groups.

PURPOSE OF THE PROJECT

The purpose of this research project is to learn from the experience of those who have gone through the three year probationary process in order to assist conferences in developing probationary programs more likely to assure that probationers move from readiness for ministry at the beginning of the probationary period to effectiveness in ministry by the end of the period.

DESCRIPTION OF THE PROJECT

PHASE ONE

In 1996, the General Conference of the United Methodist Church approved a new probationary process of at least three years for candidates seeking ordination in the denomination. Following the completion of educational requirements, future clergy spend at least three years under the supervision and guidance of an annual conference board of ordained ministry.

In 2002, thirty-six annual conference boards of ordained ministry participated in a research project conducted by Saint Paul School of Theology for the Division of Ordained Ministry to assess the probationary process. Clergy ordained in 1999, 2000, and 2001 were surveyed. Surveys were sent to 800 clergy with 250 persons completing and returning the survey. The report of this project, *The Journey from Readiness to Effectiveness: A Survey of the Probationary Process in the United Methodist Church*, was published in 2003. The report can be found online at either of these web addresses:

<http://www.wesleysem.edu/centerleadership/Report2.pdf>
<http://www.spst.edu/Resourcing/ProbSurvey.htm>

PHASE TWO

*Collaborative Research Project of Saint Paul School of Theology and the
G. Douglass Lewis Center for Church Leadership*

Phase Two builds upon the initial research project published in 2003. The results from the first survey and the feedback from conference board of ordained ministry representatives have helped identify issues that need further data, as well as issues not covered on the original survey.

A request was sent to chairs of boards of ordained ministry in October 2003 requesting the names and current addresses of persons who completed probation and were ordained in 2002 and 2003. A survey was sent to each of the clergy named. The survey instrument was based on the previous survey used for probationers who were ordained in 1999, 2000, and 2001. The original survey was developed in consultation with a task force named by the Division of Ordained Ministry that included deacons, elders, staff, directors, annual conference board of ordained ministry representatives, seminary representatives, and district superintendents. The survey was revised based on feedback from a gathering of persons responsible for the probationary process in annual conferences. Names of 838 ordinands from 2002 and 2003 were submitted from forty-four annual conferences with 328 persons completing and returning the survey (close to a 40% return rate.)

RESPONDENTS BY JURISDICTIONS

North Central Jurisdiction (NCJ)	- 66 respondents from ten annual conferences
Northeastern Jurisdiction (NEJ)	- 66 respondents from nine annual conferences
South Central Jurisdiction (SCJ)	- 54 respondents from ten annual conferences
Southeastern Jurisdiction (SEJ)	- 116 respondents from eleven annual conferences
Western Jurisdiction (WJ)	- 26 respondents from four annual conferences
Total Respondents	- 328 from forty-four annual conferences

CONFERENCES REPRESENTED BY RESPONDENTS

1. Alabama-West Florida (SEJ)	18. Louisiana (SCJ)	35. South Indiana (NCJ)
2. Arkansas (SCJ)	19. Minnesota (NCJ)	36. Southwest Texas (SCJ)
3. Baltimore-Washington (NEJ)	20. Mississippi (SEJ)	37. Virginia (SEJ)
4. California Pacific (WJ)	21. Missouri (SCJ)	38. West Ohio (NCJ)
5. Central Pennsylvania (NEJ)	22. Nebraska (SCJ)	39. West Michigan (NCJ)
6. Central Texas (SCJ)	23. New England (NEJ)	40. West Virginia (NEJ)
7. Dakotas (NCJ)	24. New York (NEJ)	41. Western New York (NEJ)
8. Desert Southwest (WJ)	25. North Carolina (SEJ)	42. Western North Carolina (SEJ)
9. Detroit (NCJ)	26. North Georgia (SEJ)	43. Wisconsin (NCJ)
10. East Ohio (NCJ)	27. North Texas (SCJ)	44. Wyoming (NEJ)
11. Eastern Pennsylvania (NEJ)	28. Northwest Texas (SCJ)	
12. Florida (SEJ)	29. Oklahoma (SCJ)	
13. Holston (SEJ)	30. Oregon-Idaho (WJ)	
14. Illinois Great Rivers (NCJ)	31. Peninsula-Delaware (NEJ)	
15. Iowa (NCJ)	32. Rocky Mountain (WJ)	
16. Kansas East (SCJ)	33. South Carolina (SEJ)	
17. Kentucky (SEJ)	34. South Georgia (SEJ)	

PROFILE OF RESPONDENTS

ORDINATION

Deacon	26	(7.9%)
Elder	302	(92.1%)

EDUCATION

Seminary Graduate	311	(94.5%)
Course of Study Graduate	12	(3.7%)
Basic Graduate Theological Studies	6	(1.8%)

AGE AT COMPLETION OF PROBATIONARY PROCESS

Range	26 to 66
Mean	43.75

PROFILE OF RESPONDENTS

GENDER

Female	155	(47.3%)
Male	173	(52.7%)

RACE

Native American	2	or	.6%
Asian or Pacific Islander	11	or	3.4%
African American	29	or	8.9%
White	277	or	85.0%
Hispanic/Latino/Latina	4	or	1.2%
Multiracial	2	or	.6%
Other	1	or	.3%
(4 did not specify a race)			

YEARS OF MEMBERSHIP IN THE UMC (OR PREDECESSOR DENOMINATIONS) AT TIME OF ORDINATION

Range	2 to 62 years
Mean	24.3 years

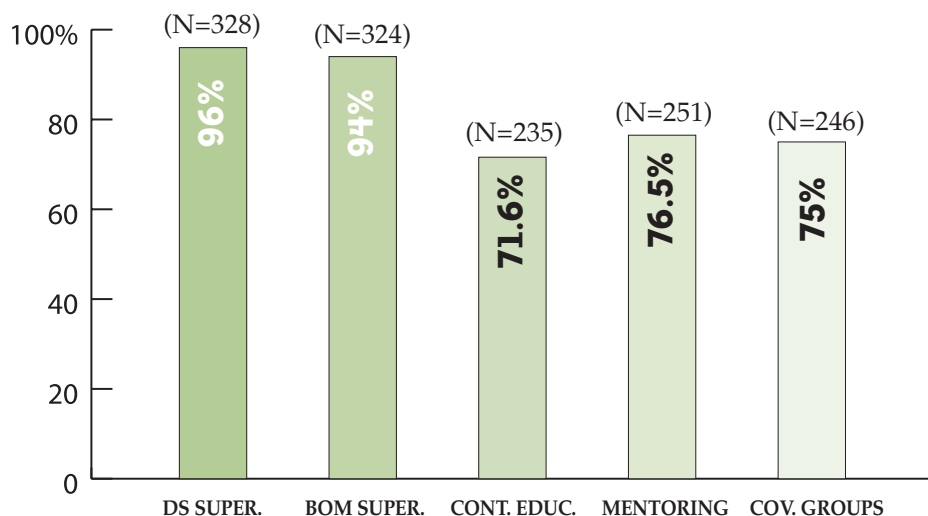
YEARS OF MEMBERSHIP IN ANOTHER DENOMINATION PRIOR TO THE TIME OF ORDINATION

Range	0 to 50
Mean	8.9

YEARS SPENT IN THE PROBATIONARY PROCESS

Two Years	48	(14.7%)
Three Years	190	(58.1%)
More than Three Years	89	(27.2%)

PERCENTAGE OF PROBATIONER EXPERIENCING THE FOUR RECOMMENDED COMPONENTS



COMBINATIONS OF THE FOUR COMPONENTS EXPERIENCED BY PROBATIONERS

SUPERVISION	MENTORING	COV. GROUPS	CONT. EDUC.	% OF PROBATIONERS
				41%
				15%
				14%
				14%
				6%
				6%
				2%
				<1%

KEY COMPONENT INCLUDED IN PROBATIONER EXPERIENCE

EXTENT TO WHICH THE FOUR COMPONENTS CONTRIBUTE TO PROBATIONERS' GROWTH AND SUCCESS

SUPERVISION BY DISTRICT SUPERINTENDENT

A great deal	15.9%	[N= 52]
Somewhat	32.0%	[N= 105]
Very little	28.9%	[N= 95]
Not at all	23.2%	[N= 76]

SUPERVISION BY BOARD OF ORDAINED MINISTRY

A great deal	14.2%	[N= 46]
Somewhat	33.9%	[N= 110]
Very little	34.3%	[N= 111]
Not at all	17.6%	[N= 57]

MENTORING

A great deal	46.3%	[N= 115]
Somewhat	31.0%	[N= 77]
Very little	14.5%	[N= 36]
Not at all	8.1%	[N= 20]

COVENANT GROUPS

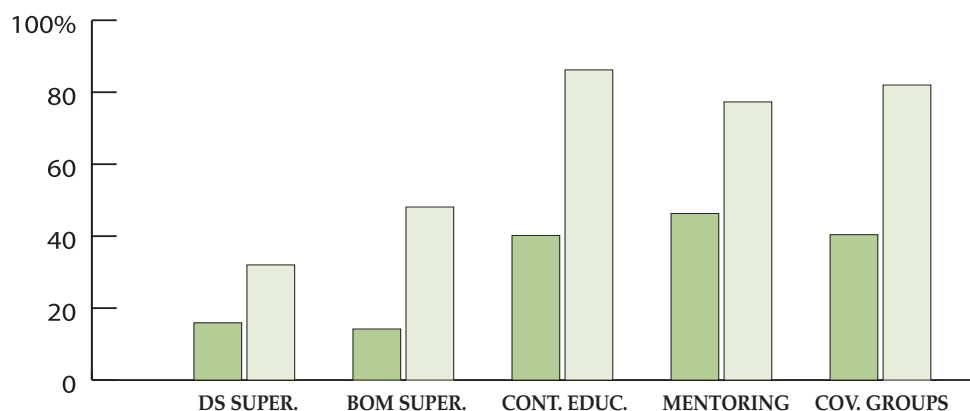
A great deal	40.4%	[N= 99]
Somewhat	41.6%	[N= 102]
Very little	15.1%	[N= 37]
Not at all	2.9%	[N= 7]

CONTINUING THEOLOGICAL EDUCATION

A great deal	40.2%	[N= 96]
Somewhat	46.0%	[N= 110]
Very little	9.6%	[N= 23]
Not at all	4.2%	[N= 10]

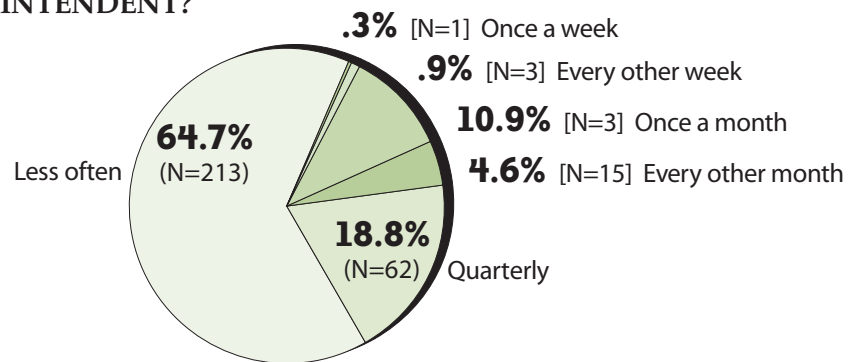
A "GREAT DEAL"

A "GREAT DEAL" AND "SOMEWHAT" COMBINED

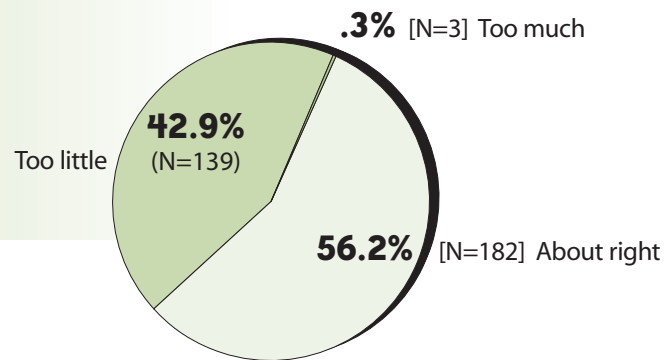


SUPERVISION BY DISTRICT SUPERINTENDENT

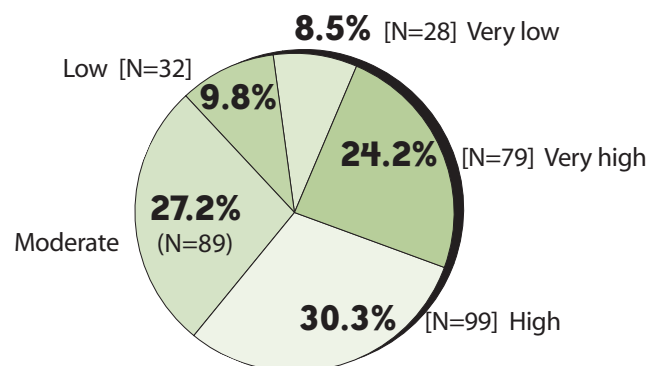
HOW OFTEN DID YOU RECEIVE SUPERVISION FROM YOUR DISTRICT SUPERINTENDENT?



WAS THE TIME SPENT WITH YOUR DISTRICT SUPERINTENDENT...?

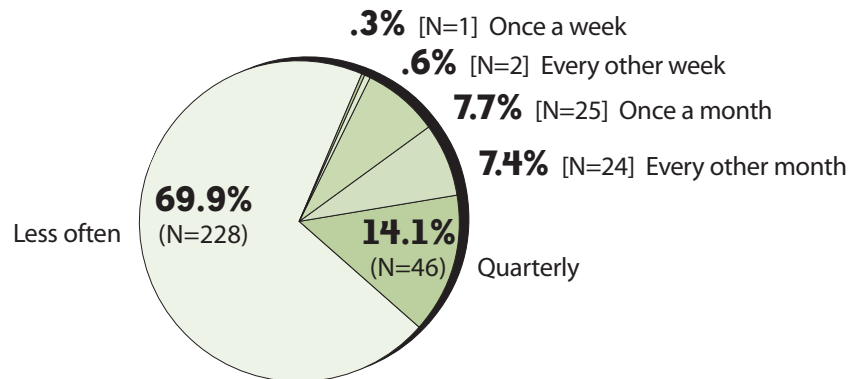


HOW WOULD YOU ASSESS THE LEVEL OF TRUST PRESENT BETWEEN YOU AND YOUR DISTRICT SUPERINTENDENT DURING THE PROBATIONARY PROCESS?

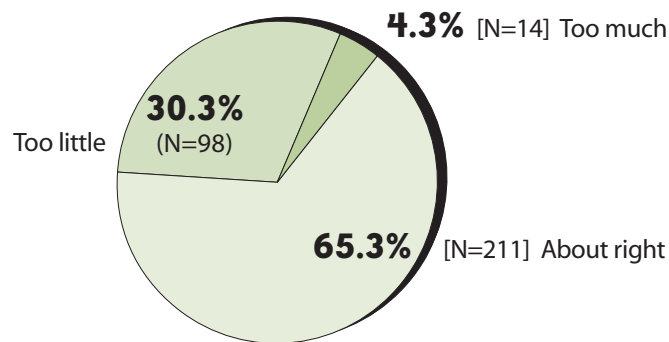


SUPERVISION BY BOARD OF ORDAINED MINISTRY

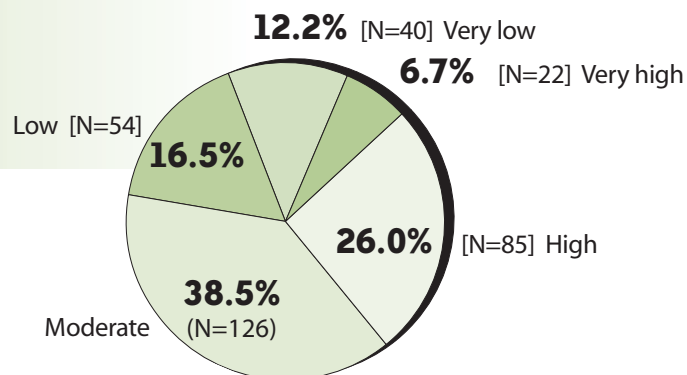
HOW OFTEN DID YOU RECEIVE SUPERVISION FROM YOUR BOARD OF ORDAINED MINISTRY?



WAS THE TIME SPENT WITH YOUR BOARD OF ORDAINED MINISTRY...?

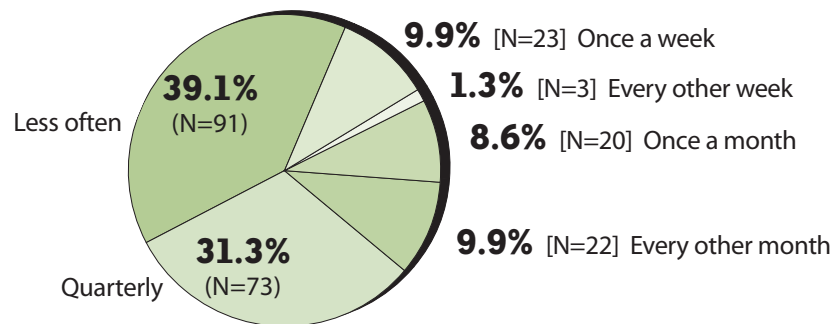


HOW WOULD YOU ASSESS THE LEVEL OF TRUST PRESENT BETWEEN YOU AND YOUR BOARD OF ORDAINED MINISTRY DURING THE PROBATIONARY PROCESS?

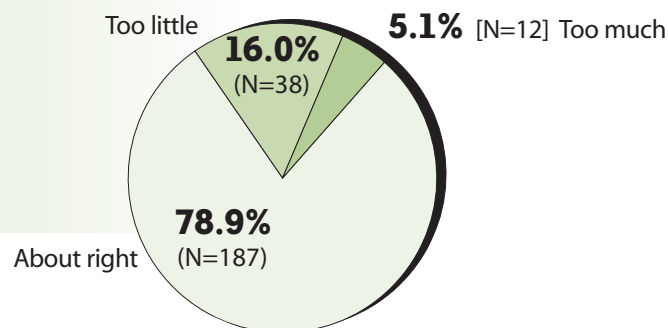


CONTINUING THEOLOGICAL EDUCATION

HOW OFTEN DID YOU PARTICIPATE IN CONTINUING THEOLOGICAL EDUCATION?



WAS THE TIME SPENT WITH CONTINUING EDUCATION...?



HOW OFTEN WAS THE CHOICE OF CONTINUING THEOLOGICAL EDUCATION MADE BY YOU?

Almost all the time	34.0%	[N= 80]
Most of the time	20.0%	[N= 47]
Some of the time	14.9%	[N= 35]
Rarely or never	31.1%	[N= 73]

HOW OFTEN WAS THE CHOICE OF CONTINUING THEOLOGICAL EDUCATION MADE BY THE BOARD OF ORDAINED MINISTRY?

Almost all the time	24.4%	[N= 57]
Most of the time	13.7%	[N= 32]
Some of the time	23.9%	[N= 56]
Rarely or never	38.0%	[N= 89]

WHEN THE SELECTION WAS MADE BY THE BOARD OF ORDAINED MINISTRY, HOW OFTEN DID YOU HAVE INPUT INTO THE CHOICE OF TOPICS?

Almost all the time	9.1%	[N= 18]
Most of the time	8.1%	[N= 16]
Some of the time	19.8%	[N= 39]
Rarely or never	62.9%	[N=124]

WHO SPONSORED THE CONTINUING EDUCATION EVENTS IN WHICH YOU PARTICIPATED BY PERCENTAGE?

BOM sponsored continuing education:

1-24% of the time	16.8%	[N= 24]
25-49% of the time	17.5%	[N= 25]
50-74% of the time	17.5%	[N= 25]
75-99% of the time	18.2%	[N= 26]
100% of the time	30.1%	[N= 43]

The mean (average) is 62%. The median (half more, half less) is 70%.

Conference or district sponsored continuing education:

1-24% of the time	30.2%	[N= 39]
25-49% of the time	24.8%	[N= 32]
50-74% of the time	22.5%	[N= 29]
75-99% of the time	12.2%	[N= 17]
100% of the time	9.3%	[N= 12]

The mean (average) is 44%. The median (half more, half less) is 33%.

Seminary sponsored continuing education:

1-24% of the time	29.8%	[N= 28]
25-49% of the time	23.4%	[N= 22]
50-74% of the time	14.9%	[N= 14]
75-99% of the time	11.7%	[N= 11]
100% of the time	20.2%	[N= 19]

The mean (average) is 48%. The median (half more, half less) is 33%.

For those indicating a percentage of their continuing education was sponsored by someone else, the mean (average) is 52%. The median (half more, half less) is 50%.

WHO PAID FOR YOUR CONTINUING EDUCATION BY PERCENTAGE?

BOM, conference or district paid for continuing education:

1-24% of the time	15.8%	[N= 24]
25-49% of the time	21.7%	[N= 33]
50-74% of the time	24.3%	[N= 37]
75-99% of the time	13.1%	[N= 20]
100% of the time	25.0%	[N= 38]

The mean (average) is 58%. The median (half more, half less) is 50%.

Local church paid for continuing education:

1-24% of the time	16.7%	[N= 22]
25-49% of the time	18.9%	[N= 25]
50-74% of the time	25.0%	[N= 33]
75-99% of the time	21.2%	[N= 28]
100% of the time	18.2%	[N= 24]

The mean (average) is 57%. The median (half more, half less) is 50%.

Personal funds paid for continuing education:

1-24% of the time	28.3%	[N= 32]
25-49% of the time	20.4%	[N= 23]
50-74% of the time	24.8%	[N= 28]
75-99% of the time	10.6%	[N= 12]
100% of the time	15.9%	[N= 18]

The mean (average) is 48%. The median (half more, half less) is 50%.

MENTORING

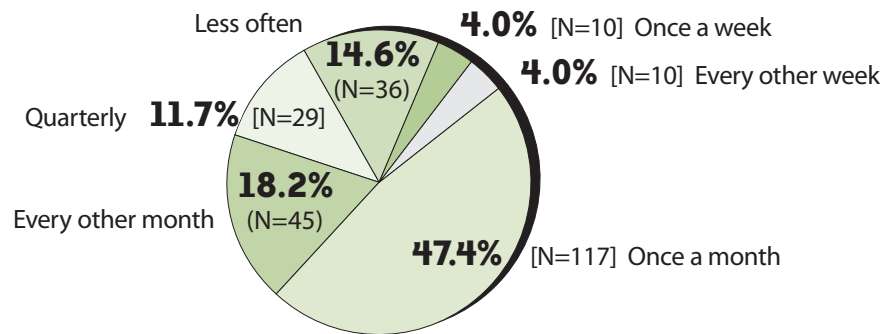
WAS THE MATCH BETWEEN YOU AND YOUR MENTOR GOOD?

Yes	87.2%	[N=212]
No	12.8%	[N= 31]

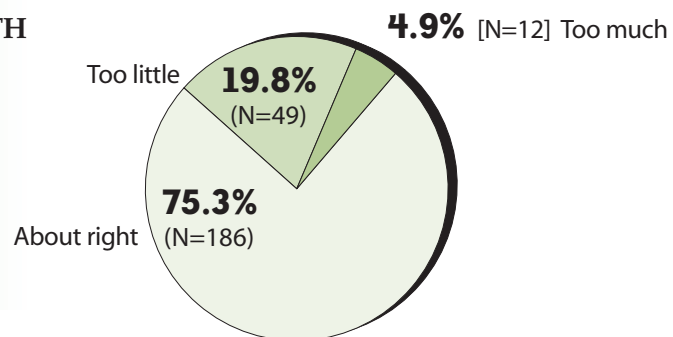
DID YOU HAVE A ROLE IN SELECTING YOUR MENTOR?

Yes	29.3%	[N= 72]
No	70.7%	[N=174]

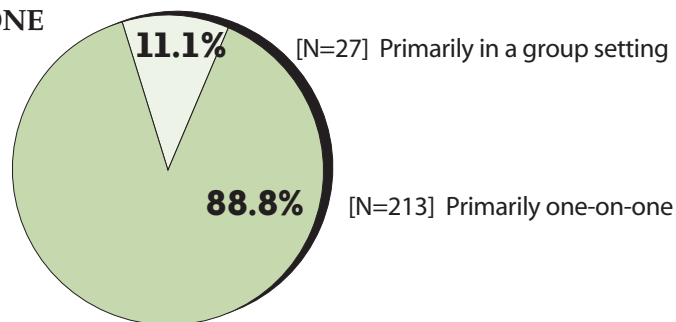
HOW OFTEN DID YOU MEET/HAVE CONTACT WITH YOUR MENTOR?



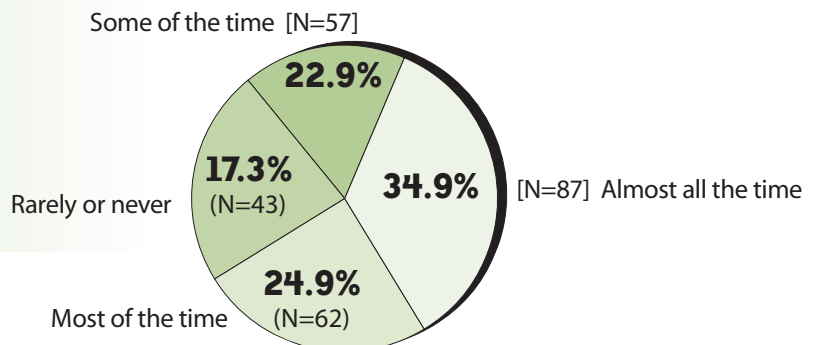
WAS THE TIME THAT YOU SPENT WITH YOUR MENTOR...?



DID YOU MEET WITH YOUR MENTOR ONE-ON-ONE OR DID MOST OF THE MENTORING TAKE PLACE WITH A GROUP?

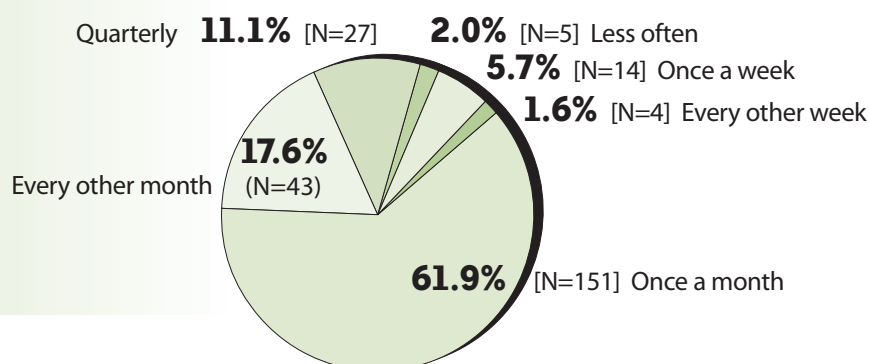


HOW OFTEN DID THE MENTORING PROCESS HAVE CLARITY OF FOCUS BASED ON PREVIOUSLY IDENTIFIED AND AGREED UPON ISSUES?

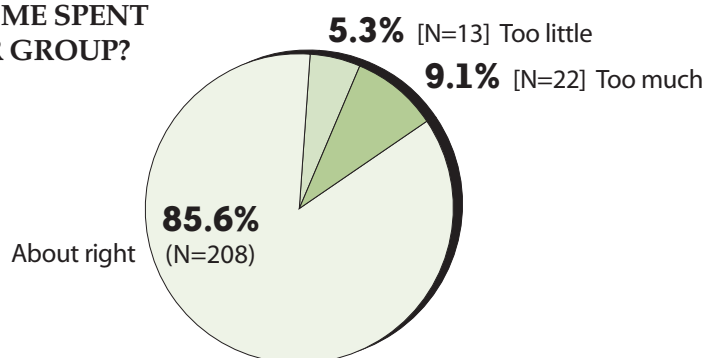


COVENANT GROUPS

HOW OFTEN DID YOU ATTEND?



WAS THE TIME SPENT WITH YOUR GROUP?



HOW MANY CANDIDATES WERE IN YOUR GROUP?

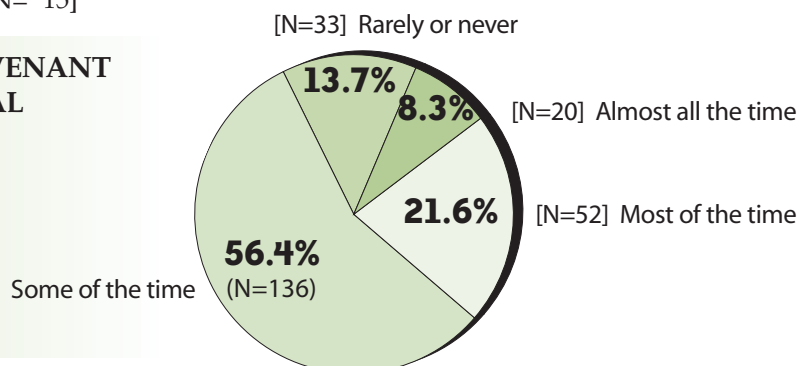
1-3 people	16.8%	[N= 32]
4-6 people	31.6%	[N= 60]
7-9 people	24.7%	[N= 47]
10-16 people	25.8%	[N= 49]
20 people	0.5%	[N= 1]
30 people	0.5%	[N= 1]

The mean (average) is 7.3. The median (half more, half fewer) is 7.
The mode (most common number) is 8.

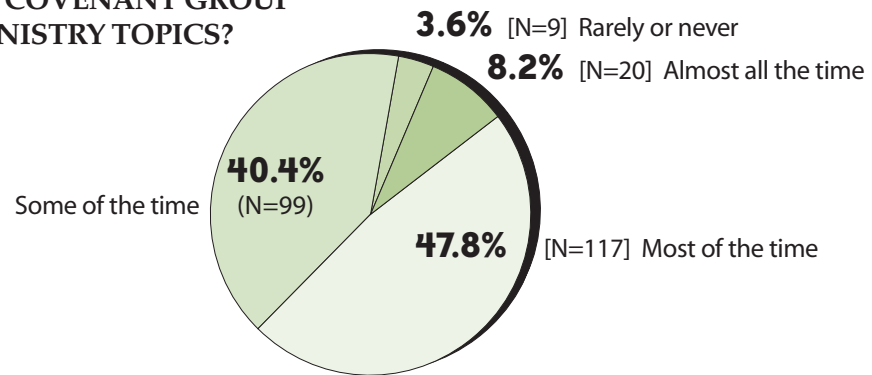
HOW WOULD YOU RATE THE OVERALL FACILITATION/LEADERSHIP FOR THE GROUP?

Excellent	29.6%	[N= 72]
Good	44.4%	[N=108]
Average	19.8%	[N= 48]
Poor	6.2%	[N= 15]

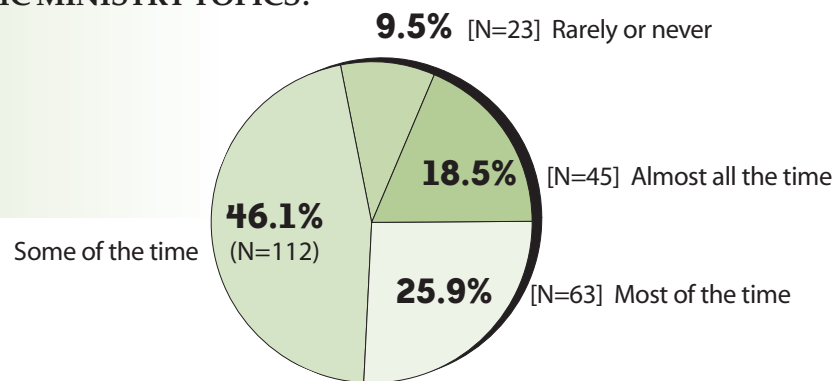
HOW OFTEN DID YOUR COVENANT GROUP FOCUS ON SPIRITUAL FORMATION PRACTICES?



**HOW OFTEN DID YOUR COVENANT GROUP
FOCUS ON SPECIFIC MINISTRY TOPICS?**



**HOW OFTEN DID YOUR COVENANT GROUP FOCUS
ON A COMBINATION OF SPIRITUAL FORMATION
PRACTICES AND SPECIFIC MINISTRY TOPICS?**



OBSERVATIONS FROM THESE RESULTS

(followed by observations from open-ended question, “What else would you like to add about....”

OVERALL PROBATIONARY PROCESS

- o Among the jurisdictions, there were differences in two components. In terms of the contribution of covenant groups, the South Central (3.48) and Western (3.47) jurisdictions scored significantly higher than the other jurisdictions. In terms of the contribution of continuing education, the Western (3.5) and North Central (3.44) jurisdictions scored significantly higher than the other jurisdictions on a 4.0 scale.
- o There are wide variations in results among the various annual conferences since each conference program is shaped somewhat differently from others.
- o The only significant difference between the responses of men and women was the extent to which continuing education contributed to growth (3.36 for women, 3.07 for men) [$t=2.83$, $p=.005^*$].
- o The only racial group other than white with large enough numbers to do follow up analysis was African American. The only significant difference between the responses of African Americans and whites came on the extent to which covenant groups contributed to their growth (2.7 for African Americans and 3.22 for whites) [$t=2.76$, $p=.006$].
- o There are no significant differences based on age.
- o There are significant differences between deacons and elders in two categories. The contribution of supervision by a district superintendent ranked 1.85 for deacons and 2.45 for elders [$t=2.95$, $p=.007$]. On the other hand, mentoring made a greater contribution to deacons who rated it 3.63 compared to 3.11 for elders [$t=2.1$, $p=.037$].
- o There are no significant differences for lifelong United Methodists compared to those who had for a time been members of other denominations.
- o There are no key differences between respondents that spent more than three years in the probationary process and those who spent three years or less.
- o Of those ordained in the two years under review (and who returned surveys), 27% spent more than three years in the probationary process.

The probationers' view of the process ranges from extremely helpful to a waste of time. On the one hand, there were comments that the experience was helpful and meaningful. For others, it was an experience to get through, not personally meaningful, but jumping through hoops. Unclear expectations can be a major stumbling block. When probationers clearly understand the purpose, process, timeline, and expectations, there is a good chance they will receive the experience well and benefit from it.

The quality of all aspects of the probationary process varies tremendously. Sometimes respondents indicate that their conference has devoted serious attention to a particular aspect of the process and that this is reflected in the quality of that particular component. However, more often the respondents suggest that whether or not the experience was positive depended more on the match, abilities, and interest of the assigned supervisor, mentor, or covenant group facilitator. Some indicate that three years is too long.

SUPERVISION

- o Supervision by a district superintendent and board of ordained ministry is the only consistently present component of the probationary process across conferences.
- o However, supervision by both the district superintendent and board of ordained ministry ranks about the same, and last of the four components, in the extent to which it contributed to the probationer's growth and success.

SUPERVISION (BY DISTRICT SUPERINTENDENT)

- o Where supervision does contribute, the level of trust between the probationer and the superintendent is the most important factor in determining supervision's impact on the growth and success of the probationer. [.621 Spearman Correlation*] Fortunately, probationers report high levels of trust. Over eighty percent report trust levels of very high, high, or moderate.
- o Next in statistical significance is the frequency of supervision. [.479 Spearman Correlation*] Two-thirds of probationers report receiving supervision from their superintendent less often than quarterly. Over forty percent feel the time spent with their superintendent is too little. Comments also indicate a desire for the district superintendent to be more involved with the probationers and the probationary process.

District Superintendent supervision greatly depends on the relationship between the superintendent and the probationer. Probationers that had a positive experience felt supported by their superintendents. Those who were not positive about the experience primarily discussed the lack of contact or neglect suggesting it was not really "supervision."

There was a general theme that the superintendent did not have the time and that the role was unclear and possibly inappropriate. Several probationers indicated that they did not know the superintendent was supposed to be their supervisor, or that the superintendent did not understand that role.

The most common pattern appears to be that the superintendent relates to clergy in the probationary process in the same way they relate to all clergy in the district, thus providing what most probationers see more as "availability" than adequate "supervision." Probationers tend to see a systemic problem rather than a lack of interest on the part of the superintendent. There is a feeling that superintendents have not been alerted to the importance of this supervisory role for probationers and have not been provided with adequate models and training for the task.

SUPERVISION (BY BOARD OF ORDAINED MINISTRY - BOM)

- o Where supervision does contribute, the level of trust between the probationer and the board is the most important factor in determining supervision's impact on the growth and success of the probationer. [.643 Spearman Correlation*] Trust levels reported by probationers are not as high for boards as they are for district superintendents.
- o Next in statistical significance is the frequency of supervision. [.468 Spearman Correlation*] Seventy percent of probationers report receiving supervision from their boards less often than quarterly, though sixty-five percent are satisfied with the amount of time spent with their boards. Thirty percent want more time.

Some had a positive, supportive experience and for others the experience was negative. Concern was voiced that the BOM evaluated but did not supervise. There was also concern that the evaluation was based on limited contact with and knowledge of the probationer. The board supervision process can be intimidating and sometimes adversarial. The interviews are high stake events. Expectations sometimes seem unclear or arbitrary. The baseline expectations probationers want most from boards are good administration of the process and good interviews.

CONTINUING THEOLOGICAL EDUCATION

- o Most conferences include continuing theological education in their probationary programs. (72%)
- o Those who experience continuing theological education find it to be the most helpful of the four recommended components contributing to their growth when “a great deal” and “somewhat” responses are combined (86%).
- o Where continuing theological education contributes, the most important factor in determining its positive impact is whether the selection of the topic was made by the probationer. [.372 Spearman Correlation*] Over fifty percent report that they selected the topics almost all the time or most of the time.
- o Having input on the topics also has a significant positive correlation. [.325 Spearman Correlation*]
- o There is one negative correlation (meaning a factor making it less likely that the continuing education will contribute to growth). When the selection of topics is made by the board with no input from probationers, there is a negative correlation of -.230 Spearman Correlation*. Thirty-eight percent of probationers report that their boards selected the topics almost all the time or most of the time. Only seventeen percent report that, when the topics were selected by the board of ordained ministry, they had input into the choice of topics almost all the time or most of the time.
- o Frequency of participation in continuing education events breaks down roughly in thirds with one-third participating quarterly, one-third less often than quarterly, and one-third more often than quarterly. However frequently they participate, probationers feel that their frequency is about right. Frequency of participation is not a major factor in continuing education’s contribution to growth. [.192 Spearman Correlation*]
- o There is no single pattern regarding who sponsors the continuing education events in which probationers participate. Most participate in a range of events sponsored by boards of ordained ministry, conference, district, seminaries, and other providers. While the largest single group of events is sponsored by conference boards, all sources have significant participation by probationers.
- o Less than one in five probationers either has continuing education expenses paid 100% by others or must pay 100% of the cost themselves. Most fund their continuing education through some combination of local church, board, conference, or district funds.
- o Comments tend to indicate a satisfaction with seminary education but a reluctance to repeat the theological disciplines during the probationary period. Virtually all the suggestions for content focused on functional aspects of ministry.

Continuing education is a strong value for probationers, but for some it presented a challenge in terms of balancing work load and time devoted to continuing education. Some pursued most of their continuing education on their own apart from the probationary process. A desire for more choice and input into the topics selected was voiced. Probationers want continuing education that is directly relevant to their ministries and that does not repeat their seminary education.

MENTORING

- o Working with a mentor during the probationary process is common. (73%)
- o Mentoring ranks first among the four components in the extent to which it contributed “a great deal” to the probationer’s growth and success. When those responded “a great deal” and “somewhat” are combined (77%) and compared with the other components, mentoring falls behind continuing education (86%) and covenant groups (82%)
- o There is a statistically significant difference in the extent to which mentoring contributes to growth and success between deacons and elders (deacons 3.63 compared to elder’s 3.11 on a 4.0 scale) [t = 2.1, p = .037]

- o Where mentoring does contribute, the most important factor in determining the impact of mentoring on the growth and success of the probationer was the clarity of focus on previously identified issues. [.625 Spearman Correlations*] Sixty percent report that there is such a clarity of focus “almost all the time” or “most of the time.”
- o Another statistically significant predictor for success of mentoring was frequency of contact with the mentor. [.523 Spearman Correlations*] About one-half met with their mentors monthly with most of the other half meeting less often than monthly. Seventy-five percent report the time spent with mentors to be about right. Most of the others desire more time.
- o As one would expect, having a good match between the probationer and the mentor is a key variable. Where probationers indicated the match was good, they felt that mentoring contributed to their growth and success at a rank of 3.4 (on a 4.0 scale), compared to a ranking of 1.6 by probationers who felt there was not a good match. [$p = .001^{**}$] Fortunately, almost ninety percent report a good match.
- o Probationers having a role in the selection of the mentor is also statistically significant. For those who had a role, their ranking for mentoring contributing to their growth and success was 3.46 compared to 3.04 for those who did not have a role. [$p = .002^{**}$] Just under thirty percent report having a role in the selection of a mentor.
- o Whether probationers received mentoring one-on-one or in a group was not statistically significant. Those in one-on-one mentoring rated the mentoring contribution to their growth and success as 3.16 compared to 3.19 for those involved in group mentoring. [$p = .902^{**}$]

It appears that the mentor connection is the prime relationship for the probationer in terms of reflecting on ministry. What is important is that there is regular, meaningful, effective communication between probationer and mentor. When that happens, the experience is successful and effective.

Mentoring is overwhelmingly positive for most. Mentoring is often cited as the most helpful part of the probationary process. The match is important. Mentoring was more effective when the mentors were clear about their role and valued the process. While probationers would like to have input into the selection of mentors, the larger concern may be that quality, fit, and willingness be the key criteria for assignment of mentors. Stability in the relationship is sometimes a problem. A few had multiple mentors during the process. Sometimes this was good and sometimes bad. Some received mentorship for only a portion of the probationary process.

COVENANT GROUPS

- o Participation in a covenant group is common. (75%)
- o The median size of a group is seven, meaning that half the probationers were in smaller groups and half in larger groups. The average size for a group was 7.3 participants. The single size group reported most often by probationers was eight participants. The largest group had thirty members.
- o There was no relationship found between the covenant group size and how much the covenant group contributed to their growth.
- o Covenant groups rank high in their contribution to the probationer's growth (82% when “a great deal” and “somewhat” responses are combined).
- o Where covenant groups do contribute, the most important factor in determining the covenant group's impact on the growth and success of the probationer is the quality of the facilitation. [.592 Spearman Correlation*] About three-fourths of probationers rated the facilitation of their groups as excellent or good.
- o Also important to the success of covenant groups is the combination of a focus on spiritual formation and ministry topics. [.425 Spearman Correlation*] Forty-four percent of probationers reported being in groups that combined these two features almost all the time or most of the time.

- o When the focus is only on spiritual formation practices, there is still a high correlation with contribution to the probationer growth. [.413 Spearman Correlation*] Thirty percent of probationers report being in groups where the focus was only on spiritual formation practices almost all the time or most of the time.
- o However, when the covenant groups focus only on ministry topics without spiritual formation practices, the correlation to probationer growth is less. [only .206 Spearman Correlation*] Fifty-six percent of probationers describe participation in such groups “almost all the time” or “most of the time.”
- o Most groups meet monthly (over 60%, with most of the others meeting less often). Meeting more frequently does not seem to make much difference. [.182 Spearman Correlation*] Almost all probationers (over 85%) feel the time spent in covenant groups is about right.

Participation in covenant groups seemed to be a positive experience. The most positive outcome of the covenant groups was the development of supportive relationships that often were sustained beyond the probationary period. Isolation is often an experience of the probationary period, and covenant groups often provide a needed connection with colleagues.

There was a great deal of variability in the quality of the facilitators. A common complaint is a lack of leadership and direction for the groups. For some, this hindered the value of the covenant groups; for others, the relationships formed outweighed the poor facilitation. Groups were generally less successful when there was a lack of continuity in the membership. Logistics, such as driving distance, were sometimes a problem. Groups were less successful when they lacked focus or became complaint sessions. When the spiritual formation dimension of the groups is lost, the value of the groups to participants drops significantly.

NOTES

*The Spearman Correlation is one index to determine the statistical significance of a variable. The following reference may help the reader get a sense of the significance of the numbers used in the Spearman Correlation. “As with all effect size indices, there is no good answer to the question, ‘What value indicates a strong relationship between two variables?’ What is large or small depends on the discipline within which the research question is being asked. However, for the behavioral sciences, correlation coefficients of .10, .30 and .50, are by convention interpreted as small, medium and large coefficients, respectively.” S. B. Green and N. J. Salkind, *Using SPSS for Windows and Macintosh: Analyzing and Understanding Data: Third Edition*. (Upper Saddle River, NJ: Prentice Hall, 2003), 240.

**A t-test is used to examine the difference between two groups. The t-value represents the sampling distribution for the differences between the mean scores of the two groups. The p-value indicates the probability that the difference found between the two groups is not a real difference but a chance difference. In the behavioral sciences, the decision rule typically follows that an acceptable level of chance is when $p < .05$. When $p = .05$ this means that there is a 95% chance that the difference is a true difference between the groups, or 5% likelihood that the difference is due to chance.

KEY THEMES FROM FIVE YEARS OF PROBATIONARY SURVEYS (1999-2003)

1. TRUST

- The establishment of trust among all participants is foundational for a positive and formative probationary experience.
- Where trust is established, programs are viewed as helpful.
- Without trust, anxiety and fear dominate the experience.
- Working against trust between probationers and BOMs are:
 - lack of direction to the process
 - inconsistency in dealing with candidates
 - failure to select, train, and hold leaders accountable
 - lack of regular communication with probationers
- The board interview process itself was found to be helpful for some, but problematic for many probationers.
- Keeping needs of probationers in the forefront can help avoid the “jumping through hoops” complaint.

2. LEADERSHIP

- After the establishment of mutual trust, the quality of the leadership of the various components of the probationary process is critical. This is most true for mentors. It is also true for covenant group facilitators, continuing theological education leaders, interview team leaders, and district superintendents.
- Selection of the right leaders for the right tasks is essential.
- Enhanced training is needed.
- More guidance, direction, and structure are needed for covenant groups.
- Leaders must be caring, available, and accountable.

3. PRACTICAL

- Engage and utilize ministry experiences in all components of the process.

4. RELATIONSHIPS

- Building a community of support and friendship is seen as one of the most significant results of the probationary years.
- Retreats and covenant groups are repeatedly named as occasions for establishing and sustaining relationships.
- Important and lasting relationships with mentors and district superintendents are often established during these years.

IMPLICATIONS AND RECOMMENDATIONS

PROCESS AS A WHOLE

- o The building of trust among all participants must be the initial primary goal for the process since all else depends on the establishment of trust.
- o A system to measure improvement in the trust level is needed.
- o A part of the initial trust building is devoting adequate time to interpreting the probationary process as “a journey from readiness to effectiveness” so that candidates come to see the process as something “for them.”
- o From the beginning of the process, allow probationer input into the content of the program.
- o Test every aspect of a conference’s program by the standard of moving candidates from readiness to effectiveness, thus viewing every component from the probationer’s perspective.
- o Boards of ordained ministry need to monitor these key elements of trust building:
 - o Sense of caring and encouragement by emphasizing quality of relationships
 - o Consistent quality in all aspects of the process
 - o Communicate regularly and often
 - o Hold all leaders accountable
- o Find ways to involve district superintendents more extensively throughout the process.
- o The findings are encouraging because:
 - o Most conferences are doing what they are supposed to do.
 - o Probation appears worth the time given to it.

SUPERVISION

- o Supervision should be a much more positive contributor to the probationer’s growth than it is currently.
- o While supervision is mandated and operating, this component of the process appears to be the one that is least understood in terms of goals and responsibilities, as well as the least effective component.

SUPERVISION BY DISTRICT SUPERINTENDENT

- o If superintendents can do only one thing special in relationship to probationers during a year, it should be to visit them at a time when the probationer is functioning in ministry other than Charge Conference.
- o The next most important thing to do is to have a session with each probationer each year at which goals for the coming year are set by the probationer in consultation with the superintendent and the previous year’s goals are reviewed.

- o If the role and expectations of superintendents in the probationary process have not been delineated, the cabinet and BOM should develop a process to clarify roles and expectations.
- o Despite the best intentions, this is one of the weakest parts of the probationary process. With all their many responsibilities, superintendents must have standard procedures or at least minimal expectations so time with probationers is built into their year-long planning.
- o Training in supervision needs to be provided for superintendents.

SUPERVISION BY BOARD OF ORDAINED MINISTRY

- o The development of clear and specific criteria that the board will use at each stage in the process to make judgments will alleviate some probationary concern. Probationers need to know assessment criteria.
- o Make sure that board members fully understand the entire ordination process.
- o Make sure the board has a clearly outlined program for the probationary process, and that the program and its rationale are communicated early and regularly to all probationers.
- o Strive for consistency in dealing with all probationers.
- o Give great care and time to the selection of all leaders who will work with probationers, including covenant group facilitators, mentors, and interview teams.
- o Communicate, communicate, and communicate.
- o Give particular attention to the interview process in terms of preparation, communication, process, and training.
- o Arrange on-site visits, preferably at a time when the probationer can be observed engaging in ministry leadership. (At least one conference has used trained lay visitation teams quite effectively.)
- o Provide enhanced training for everyone engaged in probationary process leadership roles.
- o Encourage collaboration between the board and cabinet, and provide new district superintendent orientation and training for their responsibilities related to probationers.

CONTINUING THEOLOGICAL EDUCATION

- o Make sure quality continuing education based on needs identified by the board and probationers is available, and that the probationers participate regularly in continuing education throughout the probationary process.
- o Give thanks for how well this component tends to be going, but review the educational components to avoid duplication with seminary work and to put the emphasis on practical issues that relate to the probationers' needs.
- o Allow probationers to have input for the selection of topics.

MENTORING

- o Put mentoring front and center in the probationary process. By the account of survey respondents, mentoring is likely the area where the greatest difference can be made in the lives and ministries of probationers.
- o Enhanced training for mentors is the most identified need by far.
- o Make sure mentors are assigned, trained, and functioning from the beginning of the probationary process.
- o The three keys to successful mentoring programs appear to be:
 - o selection of the right mentors
 - o adequate training with the roles of the mentor and probationer clearly defined
 - o accountability
- o The three keys to a successful mentoring relationship appear to be:
 - o establishment of a relationship of mutual trust and respect
 - o meeting regularly and often
 - o focusing on a mutually agreed upon agenda of topics for the sessions
- o Good mentors should be able to:
 - o serve as a positive role model
 - o share information that will help the probationer grow in effectiveness
 - o give guidance in the probationer's congregational, conference, and denominational ministry development

COVENANT GROUPS

- o Effective covenant groups are very important to the probationary experience.
- o Covenant groups most need quality leadership and direction. Give greater attention to the selection, training, and support of facilitators; and consider establishing recommended structures and guidelines for the groups.
- o A model that appears to work well for covenant groups combines the practice of spiritual disciplines along with reflection on topics and issues out of the probationers' experience.

STUDY AUTHOR

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A number of groups contributed through review of the survey instruments and findings. They include members of the Clergy Mentor Resource Team, Division of Ordained Ministry staff, Network of Conference Ordained Ministry Staff, and the Education for Appointed Ministry Consultation that brought together conference leaders from the North Central Jurisdiction at Garrett-Evangelical Theological Seminary.

Probationary Process Survey of Recent Ordinands

A Collaborative Research Project of Saint Paul School of Theology and
the G. Douglass Lewis Center for Church Leadership at Wesley Theological Seminary

SUPERVISION

During the probationary period, supervision is to be provided by both the District Superintendent and the Board of Ordained Ministry. Supervision may include meetings, interviews, reviews, and annual reports.

1. How often did you receive supervision from your District Superintendent?
☐ once a week ☐ every other week ☐ once a month ☐ every other month ☐ quarterly ☐ less often
2. Was the time spent with your District Superintendent
☐ too much ☐ about right ☐ too little
3. To what extent did supervision by your District Superintendent contribute to your growth and success?
☐ a great deal ☐ somewhat ☐ very little ☐ not at all
4. How would you assess the level of trust present between you and your District Superintendent during the probationary process?
☐ very high ☐ high ☐ moderate ☐ low ☐ very low
5. What else would you like to add about your experience of supervision by your District Superintendent during the probationary process?

6. How often did you receive supervision from your Board of Ordained Ministry?
☐ once a week ☐ every other week ☐ once a month ☐ every other month ☐ quarterly ☐ less often
7. Was the time spent with your Board of Ordained Ministry
☐ too much ☐ about right ☐ too little
8. To what extent did supervision by your Board of Ordained Ministry contribute to your growth and success?
☐ a great deal ☐ somewhat ☐ very little ☐ not at all
9. How would you assess the level of trust present between you and your board of ordained ministry during the probationary process?
☐ very high ☐ high ☐ moderate ☐ low ☐ very low
10. What else would you like to add about your experience of supervision by your Board of Ordained Ministry during the probationary process?

COVENANT GROUPS

During the probationary period, some conferences use covenant groups of commissioned ministers as one component of training/formation of clergy. Covenant groups provide encouragement, opportunities for reflection and vocational discernment, as well as the formation of habits and practices of covenant ministry.

11. During the probationary period did you participate in a covenant group?
☐ yes ☐ no

Answer questions 12 – 20 only if you attended a covenant group.

12. How often did you attend?

☐ once a week ☐ every other week ☐ once a month ☐ every other month ☐ quarterly ☐ less often

13. Was the time spent with your covenant group

☐ too much ☐ about right ☐ too little

14. How many candidates were in your covenant group? _____

15. How would you rate the overall facilitation/leadership for the group?

☐ excellent ☐ good ☐ average ☐ poor

16. How often did your covenant group focus on spiritual formation practices?

☐ almost all of the time ☐ most of the time ☐ some of the time ☐ rarely or never

17. How often did the covenant group focus on specific ministry topics?

☐ almost all of the time ☐ most of the time ☐ some of the time ☐ rarely or never

18. How often did your covenant group focus on a combination of spiritual formation practices and specific ministry topics?

☐ almost all of the time ☐ most of the time ☐ some of the time ☐ rarely or never

19. To what extent did the covenant group contribute to your growth and success?

☐ a great deal ☐ somewhat ☐ very little ☐ not at all

20. What else would you like to add about your experience of covenant groups during the probationary process?

CONTINUING THEOLOGICAL EDUCATION

During the probationary period, some conferences use continuing theological education as one component of training/formation of clergy. Continuing theological education can include study groups, self-directed study, conferences or classes offered by a seminary or other educational agency.

21. During the probationary period did you receive continuing theological education?

☐ yes ☐ no

Answer questions 22 – 30 only if you received continuing theological education.

22. How often did you participate in continuing theological education?

☐ once a week ☐ every other week ☐ once a month ☐ every other month ☐ quarterly ☐ less often

23. Was the time spent with continuing education

☐ too much ☐ about right ☐ too little

24. How often was the selection of your continuing theological education made by you?

☐ almost all of the time ☐ most of the time ☐ some of the time ☐ rarely or never

25. How often was the selection of your continuing theological education made by the Board of Ordained Ministry?

☐ almost all of the time ☐ most of the time ☐ some of the time ☐ rarely or never

26. When the selection was made by the Board of Ordained Ministry, how often did you have input into the choice of topics?

☐ almost all of the time ☐ most of the time ☐ some of the time ☐ rarely or never

27. Who sponsored the continuing education events in which you participated by percentage?

BOM ____% Conference or district ____% Seminaries ____%

Other sponsors (please name with percentage): _____

28. Who paid for your continuing education by percentage?

BOM, Conference, or district ____% Local church ____% Personal funds ____%

Other sources (please name with percentage): _____

29. To what extent did continuing theological education contribute to your growth and success?

☐ a great deal ☐ somewhat ☐ very little ☐ not at all

30. What else would you like to add about your experience of continuing education during the probationary process?

MENTORING

During the probationary period, some conferences use mentoring as one component of training/formation of clergy. Mentoring is conducted through a one-to-one covenant relationship that provides support, accountability, counsel, and growth in Christian maturity.

31. During the probationary period did you receive mentoring?

☐ yes ☐ no

Answer questions 32 – 39 only if you received mentoring.

32. Was the match between you and your mentor good?

☐ yes ☐ no

33. Did you have a role in the selection of your mentor?

☐ yes ☐ no

34. How often did you meet with your mentor?

☐ once a week ☐ every other week ☐ once a month ☐ every other month ☐ quarterly ☐ less often

35. Was the time spent with your mentor

☐ too much ☐ about right ☐ too little

36. Did you meet with your mentor one-on-one or did most of the mentoring take place with a group?

☐ primarily one-on-one ☐ primarily in a group setting

37. How often did the mentoring process have a clarity of focus based on previously identified and agreed upon issues?

☐ almost all of the time ☐ most of the time ☐ some of the time ☐ rarely or never

38. To what extent did mentoring contribute to your growth and success?

☐ a great deal ☐ somewhat ☐ very little ☐ not at all

39. What else would you like to add about your experience of mentoring during the probationary process?

Overall Experience of the Probationary Period

40. What else would you like to say about your experience in the probationary period?

DEMOGRAPHIC INFORMATION

1. Annual Conference _____
2. Age (upon completion of probationary period/ordination) _____
3. Gender
 - 1 Female
 - 2 Male
4. Race
 - 1 Native American/American Indian/Alaskan Native
 - 2 Asian or Pacific Islander (please specify) _____
 - 3 African American/Black
 - 4 Caucasian/White
 - 5 Hispanic/Latino
 - 6 Multi-Racial (please describe) _____
 - 7 Other (please describe) _____
5. Years spent in the Probationary Process
 - 1 Two years
 - 2 Three years
 - 3 More than three years
6. Ordination
 - 1 Deacon
 - 2 Elder
7. Education
 - 1 Seminary graduate
 - 2 Course of Study School graduate
 - 3 Basic Graduate Theological Studies
8. At the time of your ordination, how many years had you been a member of the UMC or one of its predecessor denominations?
(Please write in number of years) _____
9. In addition to membership in the UMC (or predecessor denomination), how many years were you a member of another denomination?
(Please write in number of years) _____

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