

# How Might We Change Systems to Support Clergy Well-Being? Desired Outcomes and Proposed Workplans

GBHEM and Wespath gathered two groups of clergy and lay leaders in the United Methodist Church to complete a modified design sprint to imagine changes to UMC systems that might positively impact clergy well-being. The following is a summary of the desired outcomes and proposed workplans designed by small groups during these gatherings. Where possible, we have grouped together similar topics from different gatherings.

**How Might We modify seminary/Course of Study education to close skill gap on financial management and fundraising necessary in leading non-profit organizations thereby improving potential for pay equity and vocational well-being.**

**Desired Outcomes** ♥: Pastors are competent and confident in both personal and church finances

**Key action steps** ♠:

- Identify key skills, knowledge, attitudes, behaviors to enhance confidence for personal & church finances
  - Personal: Skills = budgeting, Knowledge = investing, Attitude = more confidence, less fear, Behavior = more savings, less debt
  - Church: Skills = fundraising/managing people/stewardship, Knowledge = reading a budget/balance sheet, Attitude = more confidence, less fear, Behavior = effective annual fundraising
- Identify important resources, such as IU Lilly training, Lewis Center certificate programs, pastors already effective in these areas
- Identify how/when this education and training should occur: high quality, safe space, 1 day event with follow up coaching session; early in appointment and long before age 65. Likely after seminary education though some seminaries may be able to include it within. Key: create an attractive process that clergy will want to engage voluntarily (and limit barriers to engagement)
- Identify stakeholders (Wespath, AC treasurers, foundations, UM credit unions)
- Conduct pilot events to tweak and adjust the program before wider implementation
- Gather feedback from participants to improve the program
- Designing and implement more widely

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## **How Might We close the gap between trained skills and job expectations regarding fundraising and financial management to improve financial/professional well-being of pastors (and their congregations)?**

**Desired Outcome** ♥: Establish a nationwide, standardized clergy financial literacy program to strengthen clergy financial well-being and church financial accountability

### **Key action steps** ♠ (3 Year Plan):

- Establish National Governance & Oversight:
  - General Conference of The United Methodist Church (UMC)
  - General Board of Pension and Health Benefits (Wespath)
  - General Council on Finance & Administration (GCFA)
  - Annual Conference Treasurers & Board of Ordained Ministry (BOM)
  - Bishops & District Superintendents (DSs)
- Create the National Clergy Financial Well-Being Task Force (CFWB-TF)
  - Clergy, financial professionals, GCFA reps, Wespath experts, lay leaders
  - Task Force will oversee training curriculum, financial assistance programs, policy enforcement, and clergy mental health support
- Pass Clergy Financial Reform Legislation at General Conference 2028
  - Mandate min clergy salary standard; require nationwide financial training (12-hour curriculum)
  - Enforce mandatory church financial audits and transparency policies
  - Integrate mental health support into financial literacy training to address financial stress/burnout
- Develop & Standardize Nationwide Training Curriculum:
  - Develop a unified clergy financial literacy training curriculum
  - Include modules on retirement, tax, church finance content, UMC-specific policies, financial stress, mental health, student loan management, and digital giving; ensure regional variations in cost of living and compensation guidelines
  - Include clergy loan management and Public Service Student Loan Forgiveness, church revenue diversification, and bi-vocational financial training
  - Establish training delivery methods (online, in-person workshops, one-on-one coaching)
- Secure National Funding for Clergy Assistance & Training:
  - Establish the UMC Clergy Emergency Assistance Fund (CEAF) to provide low interest debt relief, loans, hardship grants; launch a down payment and housing assistance grant for clergy; create crisis financial assistance fund for churches at risk of closure
  - Secure \$25 million in funding over three years from various sources (\$15 M from GC allocations, \$7M from Wespath and UMC Foundations, \$3M from donor contributions and grants)
- Rollout across Annual Conferences (licensed, commissioned, and ordained clergy, church finance committees); mandate completion for ordinations; 1 refresher every 5 years
- Strengthen Church Accountability and Transparency by requiring annual financial audits for all UMC churches, implementing fraud prevention and financial oversight policies, and launching a “Healthy Church Finances” Certification Program that recognizes churches meeting best practices and offers incentives (e.g., reduced retirement contributions or access to matching grants)

\*Note detailed 3-year plan and budget recommendations available from this group

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**How Might We implement Wesleyan informed best Human Resource (HR) practices across Annual Conference structures to equip and empower clergy to better navigate power dynamics, cultivate genuine relationships and improve emotional well-being?**

**Desired Outcome** ♥: 80% of clergy are flourishing and feeling effective in ministry (using Duke metrics); feeling seen/valued, respected as individuals and having genuine friendships in the annual conference

**Other Outcomes:** Alignment between the annual conference and congregations with respect to expectations; intentional use of best practices for continuing education, supervisory training and activities for cabinet members

**Key action steps** ♠:

- Identify a single College of Bishops willing to pilot and implement some SHRM/other identified best practices infused within the conferences with respect to management/supervisory habits and continuing education to close gaps between training and work
- Engage with external consultants and thought partners to identify best practices:
  - External HR consultant
  - SHRM (partnership to learn best practices)
  - Matt Bloom- Flourishing in Ministry
  - Bridgespan Group, other similar-sized nonprofits
  - Claire Bowen (onboarding)
  - Lilly Endowment (clergy renewal leave)
  - Duke Clergy Health Initiative
  - Advocacy groups (CSROW, GCORR, National Plan)
- Infuse identified best practices in DS/DCM training for conference level and in S/PPRC training for church level; key is to have standardized training across conferences and churches that align with industry best practices
- Include best practice continuing education in Residence in Ministry, Course of Study, Standardized clergy professional education

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## **How Might We make appointments more predictable to decrease strain on clergy financial, mental, social well-being (with potential emphasis on congregational planning)?**

### **Desired Outcomes ♥:**

- Standardization (w/contextualization) of itineracy process, including consultations with churches/clergy, focus on common values and definitions (e.g., of what and who qualifies for limited itineracy), while leveraging emotional intelligence and adaptive leadership training for cabinet members (Bishops and DS)
- A new model for itineracy that reflects and responds to research around clergy health and well-being and promotes overall equity (including financial)
- Transparency and connection through centralizing clear communication and intentional relationship building across all clergy
- A clear and communicated system of support and accountability for bishops and district superintendents

### **Key action steps ♠:**

1. Identify and organize voices that can create a large-scale conversation: researchers with data on how current itineracy really impacts clergy well-being and other models of itineracy; bloggers and influencers to create healthy noise
  - Work to include this issue on agenda for Council of Bishops leadership gathering in 2026 toward potential petitions at GC 2028
  - Advocate for this to be a priority for new US regional conference
  - Comprehensive study on new model of itineracy (history, evolution, effectiveness, tensions); evaluate international models and propose an alternative plan
  - Identify Bishops open to field research to see if there is a group/conference (e.g., a College of Bishops) willing to draft/implement a standardized process including leadership accountability
  - Provide standardized training for all clergy on emotional intelligence and team/relationship building skills; collaboratively identify common values of an Annual Conference; centralize relationship building events in the AC; clarify DS role and expectations (supervisor vs. pastor's pastor)
  - Identify supporting and accountability bodies for leaders (bishops and superintendents)

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## **How Might We leverage and empower laity to reduce unreasonable expectations on clergy and create a realistic, accepted “job description” for clergy?**

**Desired Outcome** ♥ : True shared role in ministry between clergy and laity, with clergy doing <50% of the ministry of the church (CULTURE SHIFT)

**Other Outcomes:** Clergy well-being, church well-being and enhanced call of laity

### **Key action steps** ♠ :

1. Identify key lay and clergy leadership to share the message
  - a. Association of Annual Conference Lay Leaders, agencies/Discipleship Ministries/Certified Lay Ministry Groups
  - b. Clergy leadership, Assistants to the Bishop, Directors of Connectional Ministries
2. Inventory resources--what are the best trainings, things out there to educate and equip laity so they don't feel like they are floundering out there. Is there coaching that can be done to help laity build the skills to be successful?
  - a. Seminaries, Discipleship ministries, some parachurch organizations
  - b. NOT having the uninformed, untrained volunteer be responsible for training the future volunteer
3. Initiate communications, PR campaign to get it out there that we need clergy and laity to share the responsibility for the ministry of the Church
  - a. Involving the seminaries/theologian/GBHEM in reinforcing this message
  - b. Find ways to improve accuracy of lists of laity
4. Invite clergy to transfer responsibilities to laity for a shared role in ministry and invite lay people to take on the responsibilities (and empower them with training)
  - a. This is a win-win for clergy well-being, development of laity, and sustainability of Church mission
  - b. If there isn't capacity, maybe it doesn't need to be done
5. Infiltrate Study of Ministry Commission to influence understanding of role of clergy, formally and informally
6. Introduce legislation to include role of laity in commissioning questions (reinforcing importance of sharing responsibility with laity)
7. Influence cabinet/conference boards (BOOM, Board of Laity) to prioritize lay involvement in ministry through metrics that assess how well clergy and laity are sharing the mission of a church
8. Intentionally and proportionally include laity in all formal and informal gatherings
  - a. Lay leader on appointive cabinet
  - b. 2026 gathering of leadership, disproportionate representation
  - c. This could include legislation

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**How Might We enable clergy well-being through reasonable job expectations and resources that care for spirit-mind-body-relationships as part of a clergy's "job" - empowering laity and removing the expectation for clergy being all things for all needs, all the time.**

**Desired Outcome** ♥: Reduced symptoms of stress and burnout for clergy and increased engagement of laity

**Key action steps** ♠:

- Create/disseminate standardized P/SPRC training annually that leverages Book of Discipline language for role of P/SPRC and where the average pastor's time goes. Start every P/SPRC meeting with the key points of ¶258.1
  - Ideally change the Book of Discipline to include P/SPRC training
- Create/disseminate standard Pastor-P/SPRC conversation guide detailing goals for the year and time check (demystifying where pastor's time goes); work to align goals with time (what is possible and by whom)
- Identify sources of accountability and support for the pastor, including friends from seminary, P/SPRC chair, DS (?)
- Identify and disseminate case studies of engaged laity—how have congregations become more lay-led and what ideas could fit for each congregation?

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**How Might We prioritize consistent pastoral care for pastors by someone other than their District Superintendent (DS) with an emphasis on cultivating positive social emotional habits? Additionally, how might we intentionally experiment with new ways of managing responsibilities that have traditionally fallen on DS shoulders?**

**Desired Outcome** ♥: The UMC will have a sustainable hierarchical structure that develops and deploys healthy, empowered, and satisfied clergy

**Other Outcomes:** Clear roles of support for clergy; fair clarity and capacity for role of DS including clarifying scope and expertise; clarity of other roles to fill gaps

**Key action steps** ♠:

1. Write an optimizable proposal
- 2a. Talk to bishops (flip tables)
- 2b. Amplify the message
  - a. Key influencers to start
  - b. Writing articles / blogs – pressure the conversation
  - c. From the bottom to get agencies, moving (something we cannot ignore)
3. Find a place for this to live / an agency to liaison – give the “why” in the “why”
  - a. Possible examples: Connectional Table, GBHEM

**Other Action Steps:**

1. Identify people/form a team to curate connectional resources that specialize in key response and accompaniment resources
  - Connection resources: representatives from 5 agencies, chancellor, Bishop, practitioners, current Cabinet member, BIPOC, outsider systems, seminary rep, pastor in local church
  - Gather information from other denominations and annual conferences regarding supervision of clergy
2. Identify three episcopal leaders that are willing to serve as pilots/prototypes of the new leadership/DS model
  - a. Develop detailed job description for DS, Bishop, and clergy to fill in the gap with new roles (this includes ratio reduction and redistribution or elimination of responsibilities)
  - b. Cultivate a culture/vibe for health
  - c. Right size DS role and reduce the ratio of pastors to DS
    - i. Fewer DSs/more Presiding Elders (e.g., 1 DS : 12 Presiding Elders : 12 Pastors Each = 144 total/DS)
    - ii. More DSs/lower ratio
    - iii. DS teams
  - d. Possible options:
    - i. North Central – Dakota Minnesota or Iowa
    - ii. Southeast – Florida or Georgia
    - iii. South Central – Louisiana
    - iv. Funding – have a ghostwriter that can create legislation
  - e. Communication function
  - f. Key groups:
    - i. Wespeth
    - ii. Lilly Foundation

- iii. General Agencies
- iv. UMCOM
- v. Duke Endowment
- vi. TMF
- vii. Methodist Foundations
  - 1. Arkansas gives more than other places
  - 2. Michigan
  - 3. New England
- viii. Major donor in each annual conference

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## **How Might We measure the success of the church using vital signs that are contextual vs. corporate models heavily reliant on unrealistic metrics?**

**Desired Outcomes** ♥: A new end-of-year (EOY) report with metrics focusing on Sustainable Clergy Well-Being and Collaborative Ministry Models and provide incentives for clergy to take all paid time off and weekly sabbath

*Metrics focusing on clergy and congregational well-being might include:*

- Questions/ideas to consider: What are you doing for fun? How many days/week are you eating with people you love? How many days off are you getting within your role? What are weekly sabbath practices?

*Metrics focusing on Collaborative Ministry Models might include:*

- Questions/ideas to consider: How have you equipped lay leaders in your church? What activities are you pruning to avoid sideways energy? What fruits of the spirit?

**Other Outcomes** ♥: Measuring Ministry Pruning and Growth Cycles

- Death & Resurrection Cycles: celebrating the end of certain programs
- Incentivize Pruning: Encourages removing unnecessary elements
- Measuring Growth/Flowering alongside traditional metrics
- Less Sideways Energy: Advocates fewer meetings/activities that drain energy
- Use as a framework for equipping laity

**Other Outcomes** ♥: Flowering metrics for the congregation focusing on external impact of ministries, using Sacraments as a guide for congregational metrics:

- Communion: Invitation, Repentance, Confession, Peace, Storytelling, Feasting, Sending Forth
- Baptism: Grace, resisting evil, injustice, & oppression
- Additional Questions/ideas to consider:
  - How are we positioning ourselves as guests rather than hosts?
  - What are we giving away/receiving?
  - How many people are investing in their own background and leading in their spheres (PTA, councils, etc.)?
  - How many people know they are beloved children of God because of your existence?

**Key action steps** ♠:

- Attend Discipleship Ministries-sponsored gathering in April 2025 with other annual conferences to begin conversations about new metrics. Group member already scheduled to attend
- Report back to interested group members to learn how to connect with agency efforts to reform metrics

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**How Might We standardize at the both the annual conference and national level an equitable clergy compensation process that considers factors such as years of service?**

**Desired Outcomes ♥ :**

1. Fairness of Compensation / Living Wage
2. Predictability of Compensation
3. Appointments Based on Fit, Not Financial Ability
4. Centralized System that removes the burden of compensation decisions from local churches
5. Elimination of Racial Disparities
6. Consideration of years of service and geographic wage requirements
7. Reduce discrepancies between local church pastors and cabinet members

**Key action steps ♠ :**

- Create a white paper that identifies best practices from other countries, denominations (use of Church Benefits Association), unions, and data from Northern Illinois (N. IL) and Florida (FL) Annual Conferences AC to inform a vision for a new clergy compensation process over the next four years
- Create/leverage Interagency Task Force: Collaborate with the N. IL and FL AC, and the Duke Clergy Health Initiative to create the white paper and organize a grassroots campaign on salary compensation with Equitable Compensation committees
- Encouraging key leaders (Andy Hendren, Bishop Schwerin, David Eagle, David Scott, GS Fernandes) to commit to the initiative

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