

Leadership Guidelines for the UMC

These guidelines are excerpts taken from the 2013-2016 Guidelines For Leading Your Congregation Church Council, Finance, Lay Leader, Nominations and Leadership, PPR, Trustees, and Pastor Copyright © 2012 by Cokesbury. Used by permission.

Leadership in Vital Ministry

Each person is called to ministry by virtue of his or her baptism, and that ministry takes place in all aspects of daily life, both in and outside of the church. Your leadership role requires that you will be a faithful participant in the **mission of the church**, which is to partner with God to **make disciples of Jesus Christ for the transformation of the world**. You will not only engage in your area of ministry, but will also work to empower others to be in ministry as well.

The vitality of your church, and the Church as a whole, depends upon the faith, abilities, and actions of all who work together for the glory of God. Clearly then, as a pastoral leader or leader among the laity, your ministry is not just a “job,” but a spiritual endeavor. You are a spiritual leader now, and others will look to you for spiritual leadership. What does this mean? *All* persons who follow Jesus are called to grow spiritually through the practice of various Christian habits (or “means of grace”) such as prayer, Bible study, private and corporate worship, acts of service, Christian conferencing, and so on. Jesus taught his disciples practices of spiritual growth and leadership that you will model as you guide others. As members of the congregation grow through the means of grace, they will assume their own role in ministry and help others in the same way. This is the cycle of disciple making.

The Church’s Vision

While there is one mission—to make disciples of Jesus Christ—the portrait of a successful mission will differ from one congregation to the next. One of your roles is to listen deeply for the guidance and call of God in your own context.

- In your church, neighborhood, or greater community, what are the greatest needs?
- How is God calling your congregation to be in a ministry of service and witness where they are?
- What does vital ministry look like in the life of your congregation and its neighbors?
- What are the characteristics, traits, and actions that identify a person as a faithful disciple in your context?

This portrait, or vision, is formed when you and the other leaders discern together how your gifts from God come together to fulfill the will of God.

Assessing Your Efforts

We are generally good at deciding what to do, but we sometimes skip the more important first question of what we want to accomplish. Knowing your task (the mission of disciple making) and knowing what results you want (the vision of your church) are the first two steps in a vital ministry. The third step is in knowing how you will assess or measure the results of what you do and who you are (and become) because of what you do. Those measures relate directly to mission and vision, and they are more than just numbers.

One of your leadership tasks will be to take a hard look, with your team, at all the things your ministry area does or plans to do. No doubt they are good and worthy activities; the question is, “*Do these activities and experiences lead people into a mature relationship with God and a life of deeper discipleship?*” That is the business of the church, and the church needs to do what only the church can do. You may need to eliminate or alter some of what you do if it does not measure up to the standard of faithful disciple making. It will be up to your ministry team to establish the specific standards against which you compare all that you do and hope to do. (This Guideline includes further help in establishing goals, strategies, and measures for this area of ministry.)

Leadership Organization

You have some freedom in your leadership organization but every congregation must make provision for including these functions according to the *Book of Discipline* (§252). Positions may be combined except for the financial functions. “The positions of treasurer and financial secretary should not be combined and held by one person, and the persons holding these positions should not be immediate family members (§258.4).”

- Nominations and Leader Development (3-9 people)
- Pastor/Staff Parish Relations Committee (3-9 people)
- Trustees (3-9 people)
- Finance Committee Chair
- Lay Leader
- Lay member of annual conference
- Financial secretary
- Church treasurer
- Membership secretary
- Church Council chair

In addition to leaders who manage these functions, the church council shall include people who represent the program ministries of the church

Church Council Responsibilities

The Book of Discipline of The United Methodist Church says that the church council is the executive agency of the charge conference (§244). This means that between meetings of the charge conference, the church council is the group of leaders who guide and further the ministry of the congregation. The church council exists to create and supervise the strategic plan to envision, plan, implement, and annually evaluate your congregation’s ministry and mission to be an effective congregation.

The *Discipline* (§ 244.3) states clearly that members of the church council shall be persons of genuine Christian character who love the church, are morally disciplined, are committed to the mandate of inclusiveness in the life of the church, are loyal to the ethical standards of the church and are competent to administer its affairs.

- The church council oversees and coordinates ministry among several groups including trustees, finance committee, discipleship groups, outreach efforts, pastor-parish relations, nominations, and others.
- The council will need to determine how it will be organized, how often it will meet, how it will set priorities.
- The church council will need to determine how it will evaluate the congregation's plan for discipleship, and how it will allocate your congregation's resources.
- The church council is responsible to communicate and coordination activities within the church.
- Church council members, as leaders of a congregation, need to be able to explain to others what it means to be United Methodist. Our core beliefs, practices, and understanding of what it means to be a Christian disciple are outlined in the *Book of Discipline*. Sanctification, social holiness, and itinerancy are three unique and distinctive features that impact your leadership on the church council.

Finance

Another key administrative group is the committee on finance. The chair of this committee, the church treasurer, and the financial secretary are members of the church council. This committee is responsible for creating a budget for the ministry of the congregation and for developing a plan to raise adequate funds in support of the congregation's needs, both routine and special.

The financial secretary records income to the church, while disbursements are made and recorded by the treasurer. Periodic reports are prepared by the treasurer and submitted to the church council for approval. The finance committee serves as the consultant to the church council on financial matters. The role of the committee on finance is not to set the spending priorities of the church, but to facilitate this congregation-wide activity of discerning, planning, and budgeting for God's mission.

In many local churches, money talk is taboo. While churches are dependent upon the offerings of members and constituents, many people do not like to hear too much money talk in church. This stands in stark contrast to the Bible where money talk is both frequent and pointed. The Bible portrays money as a powerful force in life and ultimately, a contender against God for a person's primary loyalty. Financial transparency and openness is achieved by

- (a) sharing clear, easy-to-understand financial reports with members;
- (b) implementing a strong system of internal controls; and
- (c) providing for an annual audit of the financial reports.

Responsibilities of Committee on Finance

In *The Book of Discipline of The United Methodist Church*, (§258.4) the committee on finance is charged with all of the following activities:

- overseeing stewardship
- compiling a budget annually and submitting it to the church council for review and adoption

- raising sufficient income to meet the budget
- administering funds received by the church counting and depositing the offering
- disbursing funds including timely payment of apportionments
- establishing internal control policies
- annually reviewing and reporting on the adequacy and effectiveness of internal controls
- providing for an annual audit of the church financial statements
- reporting to the annual charge conference on the audit
- recommending proper depositories for church funds
- using contributions in accordance with donors' intent
- annually reporting to the church council all designated funds that are separate from the church budget

Who Should Be on the Finance Committee

The *Discipline* provides for the committee on finance to be made up of persons who, by virtue of other leadership responsibilities, link the committee to other areas of congregational life, and others who are nominated in recognition of their commitment and witness of personal stewardship. The *Discipline* calls for the following members of the committee:

- chairperson
- pastor
- lay member of the annual conference
- chairperson of the church council or board
- chairperson or representative of staff/pastor-parish relations committee
- representative of the trustees (selected by the trustees)
- lay leader
- financial secretary
- treasurer
- others as determined by the charge conference

The finance committee can help the local church realize that apportionments are not taxes levied by the annual conference, but rather are a key way in which the local church shares in the larger ministry of The United Methodist Church. The ministry of each local church is expanded and multiplied through apportionments. No matter how small or large the local church, payment of apportionments enables the local congregation to support ministries that it never could on its own.

The Treasurer's Responsibilities

The church treasurer is responsible for carrying out most of the financial decisions made by the committee on finance. The *Discipline* (§258.4b) charges you with broad responsibility for the following three general areas:

- Disbursing funds: The church treasurer(s) shall disburse all money contributed to causes represented in the local church budget, and such other funds and contributions as the church council may determine.
- Reporting: The church treasurer shall make regular and detailed reports on funds received and expended to the committee on finance and the church council.

- Making monthly remittances to the conference treasurer: The treasurer(s) shall remit each month to the conference treasurer all World Service and conference benevolence funds then on hand. Contributions to benevolence shall not be used for any cause other than that to which they have been given.

Financial Secretary Responsibilities

The position of financial secretary is one of the most important and sensitive offices in the church. The information you compile about contributions to the church is important to both donors and to the church. Donors rely on you for accurate data to include on their tax returns. The church, and particularly the treasurer, depends on you to report correctly both the amount and the purposes for which each gift was given so that the donor's intent can be honored. The *Discipline* charges you with broad responsibility for the following three general areas:

- Supervising the offering count
- Promptly depositing cash from offerings in the bank in accordance with procedures established by the committee on finance, and giving a record of each deposit to the treasurer
- Keeping records of contributions and maintaining confidentiality in regards to individual contributions

Lay Leader Responsibilities

The Lay Leader serves as an advocate and model of faithful Christian discipleship. They understand what it means to be a part of the ministry of all Christians and that all persons are called by God to ministry. A part of this advocacy work includes the recognition that the lay leader should be a person of faith and integrity. As an "extension" of the congregation in the community, the lay leader also will need to be aware of the reputation the church has in the community and work either to enhance it or improve it. The lay leader is an advocate for the needs of the community and is to inspire the congregation to care for those beyond the walls and windows of the church and foster the role of the laity in mission and ministry.

The lay leader:

- Serves as a role model for the laity by modeling good habits of personal devotion and discipleship and continues to be involved in spiritual study and training opportunities
- Is sensitive to the needs of the laity and represents them in the local church
- Recognizes and celebrates the ministry of the laity
- Meets regularly with the pastor to discuss the state of the congregation and the needs for ministry both within and beyond the congregation
- Is a member of the charge conference, church council, and other committees
- Assists in advising the church council by sharing ways in which the congregation could provide mission and ministry opportunities to meet the needs of persons in the community.

Pastor-Parish Relations

United Methodist congregations give the Pastor-Parish Relations Committee the responsibility for administering the relationship between staff, congregation, and the district superintendent so that the mission of the Church moves forward. Strong relationships lead to ministry that impacts Christian disciple-making so that God's will may be done for the transformation of your community and our world. "People serving on this committee must be engaged in and be attentive to their Christian spiritual development so as to give proper leadership in the responsibilities with which the committee is entrusted" (§258.2). This summary of specific tasks for the S/PPRC is listed in (§258.2g) in *The Book of Discipline of The United Methodist Church* (with added suggestions from the Task Force on Clergy Health and the General Commission on the Status and Role of Women).

- Encourage, strengthen, nurture, support, and respect the pastor and staff and their families, including advocating for a healthy work/life balance.
- Promote unity in the churches.
- Confer with the staff on the effectiveness of ministry and impediments to effectiveness, including conflict of interest, and sexual misconduct.
- Confer with the staff about effective use of their gifts, skills, time, and priorities.
- Conduct annual staff evaluations.
- Teach the congregation about itinerancy, steps into ordained ministry, the value of diversity in staffing, and the ministerial education fund.
- Write job descriptions for staff.
- Confer with staff about continuing education and spiritual formation.
- Confer with the district superintendent about the clergy leadership for the congregation.
- Recommend staff positions to the church council.
- Create written personnel policies and sexual misconduct policies for the congregation.
- Consult on matters of staff support including housing, vacation, insurance, pension, and other matters outlined in the *Discipline*.
- Identify new church leaders. The *Book of Discipline* says the S/PPRC is "to enlist, interview, evaluate, review, and recommend annually to the charge conference lay preachers and persons for candidacy for ordained ministry, and to enlist . . . [candidates] for missionary service."
- The PPRC is to meet at least quarterly.

Trustees Responsibilities

The charge conference is the primary governing body of your church. It sets the policy and direction for all work and ministry of the church. The trustees are elected by the charge conference to act as its agent in caring for the physical resources of the church and for all legal matters. The trustees shall report at least annually to the charge conference about the state of the church's property, equipment, investments, and resources in their care.

The trustees are to supervise and maintain all property belonging to your congregation so that the ministries of the congregation can be effective. You will work closely with the church council

to respond to God's call. The trustee chair or a representative is responsible for taking the recommendations of the trustees to the church council for approval and action. They are also responsible for taking recommendations and directions of the council back to the trustees.

The primary purpose of the church building and facilities is to enable the vision and ministry of the congregation. Good stewardship, common sense, and prudence dictate that the church, parsonage, facilities, property, equipment, furnishings, and other physical property be well maintained. A physical plant that is "well-groomed" and attractive is much more welcoming, safe, and hospitable than one that shows signs of benign neglect. We honor God when we care for what has been entrusted to us, but we must be careful that the property does not become an item of worship in itself.

The trustees together have several legal and administrative functions. They are to:

- oversee, maintain, and supervise all local church property.
- report annually to the charge conference on the state of the church's property, equipment, investments, and resources.
- receive and administer all gifts made to the congregation; make certain that all trust funds of the congregation are invested properly.
- ensure that the articles of incorporation of the congregation are kept up to-date, if applicable.
- be responsible, *in conjunction with the pastor*, for all use of the church buildings and grounds.
- maintain adequate insurance coverage on all church property and develop appropriate risk management policies.
- submit to the committee on finance the annual budget requests for insurance, property maintenance and improvement, and new property purchases.
- be accountable to the charge conference and to the church council.

Much of the work of the trustees is governed by specific requirements of *The Book of Discipline of The United Methodist Church*.

The board of trustees is composed of not more than nine or fewer than three members. At least one-third of the trustees shall be laywomen, one-third laymen, and two-thirds must be members of The United Methodist Church (§2525, the *Book of Discipline*).

Nominations and Leadership Development Responsibilities

It is the role of the committee on nominations and leadership development to help people identify their gifts and understand how they can use their unique combination of gifts in service for Christ *in the world*. According to *The Book of Discipline of The United Methodist Church* (§258.1) the committee on nominations and leadership development is to:

- **identify** the gifts and strengths of persons in the congregation
- **develop** their gifts and skills and nurture them in their mission or ministry roles
- **deploy** persons according to their gifts and passion in areas of service within the church, community, and world (see also §126.)

- **evaluate** the effectiveness of their service and provide necessary training and support
- **monitor** the progress of their development and celebrate their accomplishments and service

Developing Spiritual Leaders

Developing spiritual leaders within the congregation is crucial and should begin with all committee members. You have the opportunity and the privilege to be an example of spiritual leadership. The *Discipline* states that “committee members shall engage in and be attentive to developing and enhancing their own Christian spiritual life in light of the mission of the Church” (§258.1). In order to help others develop in their spirituality, committee members must themselves engage in Christian spiritual practices that cultivate their relationship with God and participate in study for continuous spiritual growth and leadership skill improvement.

Developing Servant Leaders

As you develop leaders within your congregation, emphasize the importance of becoming a servant leader. Servant leaders serve out of a humble spirit, not out of pride or a sense of importance. When approaching someone regarding a leadership position, be sure to express this as a ministry of service and not simply as an elected position. (If it is that, either change the position into a vital ministry role or eliminate it!) Provide servant leader training sessions to support new leaders in their roles as servants of Christ.

Pastor

All pastors have the same general responsibilities that fall into four main categories, described as Word, Sacrament, Order, and Service. This four-fold ministry includes (but is not limited to):

- preaching;
- worship;
- studying and applying Scripture to daily life;
- celebrating the sacraments;
- developing congregational leaders and training laity;
- administration and steward of the vision by attending to the day-to-day business of the church;
- caring for the spiritual and temporal needs of the congregation and community;
- modeling and leading the congregation in acts of compassion, mercy, and justice;
- nurturing the congregation for mission and ministry for the transformation of the world as faithful disciples of Jesus Christ (see the *Book of Discipline* ¶331).
- Participant in the United Methodist connection
- Community minister

Custodian of Institutional Integrity

Integrity is a crucial issue in the life of every Christian and every church because integrity has to do with living out, individually and corporately, the values we espouse, doing what we say we will do, and being who we say we are. It is grounded theologically in God’s own integrity of keeping covenant and being trustworthy. Because we represent Christ to the world and one another, our integrity is vital. To the extent a pastor or congregation does not live with integrity in all things, their witness will be diminished.

Institutional integrity is represented by those qualities that present the congregation to the community as a place of hospitality, honesty, safety, hope, and reconciliation. Institutional integrity is also about being faithful to the traditions, polity, and beliefs of The United Methodist Church and to its ethical standards. When the church misses the mark in any of these ways, serious harm can result for the witness of the Christian faith. Conversely, if people know you and the church members are trustworthy, they have a better chance of experiencing God as trustworthy. Therefore, it is hardly possible to overstate the importance of the role of the pastor in maintaining the institutional integrity of the congregation. Four areas of institutional integrity deserve special mention: handling money; safety; upholding the traditions, polity, and beliefs of The United Methodist Church; and living up to the moral and ethical standards of the Christian faith and the denomination.