

Center for Clergy Excellence + Texas Annual Conference  
**Birkman Personality and Leadership Style Assessment  
Policies**

The Center for Clergy Excellence has chosen to offer Birkman personality and leadership style assessments to Conference clergy in order to help clergy better understand themselves and the people with which they work. The Birkman assessment does not measure skills, and therefore is not a tool for annual assessment. Personality traits do not generally change over time, and are neither positive nor negative. However, becoming aware of professional strengths, needs, and preferred work styles can help clergypersons understand how they might react under stress and learn how to order their lives such that their needs are met in healthy ways. Acknowledging others' differing strengths, needs, and preferred work styles can help clergy persons collaborate with colleagues to equip congregations to make disciples of Jesus Christ for the transformation of the world.

### **Fees**

#### **Residency Covenant (RC – formerly DCM) and Professional Disciplines (PD) Groups**

Fees for all Residency Covenant and Professional Disciplines Groups are covered by the Center. Assessment fees (\$75) are paid for by the Center directly to Birkman. Coaching is supplied by volunteer coaches who waive their fees. All supplies for RC and PD groups are provided through the Center (binders, individual reports, nametags, etc.)

RC groups will have a 2 hour follow-up session within 1 to 6 months following the initial debriefing. The coach leading the follow-up session will receive a stipend of \$500 plus travel expenses, paid for by the Center. The 2 hour follow-up session will be required for RC groups and will be scheduled when the orientation conference call and the initial 5 hour debriefing are scheduled, so that all dates are determined in advance. Following the initial debriefing, each participant will receive an electronic pdf copy of their assessment by email, in addition to the printed report binder received at the debriefing, to assist in review of their assessment prior to the follow-up session.

### **Clergy Groups**

Clergy groups (CD groups, etc.) must pay \$75 per participant to the Center for the assessment. Coaching fees are waived – coaching is supplied by volunteer coaches on a first come, first served basis after RC and PD groups have been served. All supplies for clergy groups are provided through the Center (binders, individual reports, nametags, etc.) (This group includes District and Conference staffs).

### **Individual Clergy**

Individual TAC clergy are given the benefit of the \$75 group fee payable to the Center for their assessment which includes all materials (binder, individual report, etc.) to be provided by the Center. The report will be printed in the Center Standard format. Coaching fees are assessed and invoiced by the coach at the rate of \$100 per hour, plus expenses. Coaches will collect the fees directly from the client and will send a check for \$75 to TAC for the cost of each individual assessment.

### **Church Staff/Ministry Team Groups**

Groups that include non clergy (church staffs, church leaders, ministry teams) must pay \$75 per participant to the Center for the assessment. Coaching fees are assessed and invoiced by the assigned coaches at the rate of \$100 per hour, per coach plus expenses (mileage, lodging, and meals). The TAC Birkman Policy states that groups must be debriefed by a coaching team (minimum of 2) and that the debriefing is for a minimum of 4 hours. Coaching fees are paid directly to coaches. All supplies for these groups are provided through the Center (binders, individual reports, nametags, etc.) These groups are the lowest priority for service. The Center can refer a group to an approved list of certified Birkman Coaches.

### **Coaches**

Typically, volunteer “coaches”--certified by Birkman--will work in pairs to coach clergy peer groups. When interested clergy peer groups contact the Center for Clergy Excellence to request Birkman coaching, the next available coaching pair will be assigned. The group leader will coordinate scheduling for the orientation and coaching sessions with the coaching team and Center staff. Coaches will not be expected to coach more than two sessions each calendar year as Conference volunteers. Coaches will be sustained by access to Birkman’s website, regular e-mails, additional training sessions, and annual confidential Center equipping sessions.

The Birkman is debriefed in small groups with a minimum of 5 and a maximum of 15 per group. Larger groups would require more than one coaching team.

### **Process**

Interested clergy persons may contact the Center for Clergy Excellence to initiate Birkman assessments and coaching. A minimum of two months’ notice is required, and scheduling for the orientation and coaching sessions will be worked out between the clergy peer group leader, the coaching team, and Center staff. Prior to the Orientation conference call, coaches will provide participant contact information to Center staff who will send orientation information and group release forms to all participants. After the Orientation conference call and all group releases have been received, Center staff will initiate assessments via e-mail, print and bind Center Standard report sets, create nametags, create and forward group PowerPoint presentations to coaches, provide group debriefing binders and materials to the coaches, and send out invoices for the assessments. Prior to coaching sessions, coaching teams will prepare using individual and group reports. After coaching sessions, coaches will return unused supplies, individual reports of no-shows, Birkman instructional tools, and feedback forms to Center staff.

### **Follow up**

To help the Center continually improve assessment sessions, participants will be asked to complete a feedback page at the end of each Conference Birkman coaching session. All feedback forms will be collected by the coaching teams and returned to the Center.

### **Additional Coaching Options**

After group coaching sessions, some individuals may want to talk confidentially to a Birkman coach one-to-one. Individuals will be encouraged to phone volunteer coaches with questions or concerns. “One issue” phone conversations with a coach which last ten minutes or less are available at no additional charge. Individuals are encouraged to request additional coaching.

However, additional coaching will be invoiced according to the fee schedule above, at \$100/hour plus expenses.

### **Center Standard Birkman Report Set**

The standard report set includes 68 pages:

- Cover sheet
- Birkman Preview (33 pages)
- Profile summary (inserted in front pocket of binder)
- Areas of Interest with dictionary (inserted after page eight of the Birkman Preview)
- Preferred Work Styles (inserted after page 22 of the Birkman Preview)
- The Coaching Report without workbook (17 pages)
- Coaching (one page)
- Interpersonal Needs (one page)
- Needs at a Glance (one page)
- Stress Pages (eight pages)
- Evaluation Form (back pocket)
- Birkman Policies (back pocket)

Coaches should feel free to make additions to the standard report set during initial coaching sessions, or make additional information available later.

### **Group Debriefing Agenda (9:30 to 4:00 – 5 hours plus breaks)**

#### Morning Session

- |              |                                                                                   |
|--------------|-----------------------------------------------------------------------------------|
| 5 minutes    | Introductions, Birkman Background; first designed for the church                  |
| 5-10 minutes | Define colors (Fun icebreaker – use game or story, like “20 cats are in a house”) |
| 30 minutes   | Define interests                                                                  |
|              | Interests - Look at those 85 or above, turn to partner, explain how play out      |
|              | Look at those below 15, discuss how different we are                              |

(Short break)

- |            |                      |
|------------|----------------------|
| 35 minutes | Life Style Grid      |
| 30 minutes | Organizational Focus |

(Long break/meal)

#### Afternoon Session

Components (with short break)

Coaches should feel free to make substitutions, changes or additions to the group debriefing agenda which are appropriate for the setting and the size and personality of the group.

### **Continuing Education Credit**

Clergy who participate in a Birkman assessment and debriefing will receive one contact hour of CE credit for each hour spent with a Birkman coach. For the RC/PD group debriefings, clergy will receive .5 CE credit (5 contact hours). RC groups will receive an additional .2 CE credit (2 contact hours) for the follow up session. For individual clergy and clergy participating in church staff/ministry team debriefings, CE credit will be determined by the length of the debriefing (one contact hour of CE credit for each hour spent with a Birkman coach).

**Priorities**

Residency Covenant (RC) Groups and Professional Disciplines (PD) Groups will be offered Birkman assessments first, and all costs for these groups will be covered by Center for Clergy Excellence funds. Once debriefings are scheduled, all RC group members including the mentor are expected to participate in the debriefings.

**Confidentiality**

Birkman assessments will be kept in strict confidence. Assessments will be shared or released only with the expressed permission of the person assessed. Assessments will not be released to District Superintendents, Cabinet members, Center Directors, or the Bishop without the expressed permission of the person assessed. Volunteer coaches with access to Conference Birkman information will sign covenants of confidentiality, agreeing to access or share individual Birkman assessments only after a signed release form is received. When coaching follows assessment in group settings, all group members must agree to share information prior to group coaching, and only individuals will retain copies of their individual assessments.