

Pastoral Evaluation as Dialogue and Discernment

Based on *When Better Isn't Enough* by Jill Hudson (Alban Books, 2004)

Pastoral Evaluation Overview

Assumption #1: No pastor is perfect. As those who worship and serve in the Reformed tradition of Calvin, Zwingli, and Knox, this truth is something on which we can all agree. Not only is no pastor perfect, but the work of ministry is sufficiently complicated that no one—no, not one—can be proficient at every task.

Assumption #2: Performance evaluations are inherently anxiety producing. Perhaps there are exceptions among clergy, but most pastors find the evaluation process difficult: well-intentioned church members bring evaluative methods from business or government, often with multiple and conflicting processes present among the typical Personnel Committee, and such methods often have little to do with the work of being a pastor.

Assumption #3: Further complicating the pastoral evaluation process is that evaluations are usually conducted in coordination with the church budget cycle, which suggests the pastor's employment and/or compensation is dependent upon a "good" review, even though most churches lack a common definition of what good looks like. Connecting evaluations to the church budget creates an unnecessarily adversarial—or at least defensive—dialogue, which is unhelpful at best and can be destructive.

What, then, is a Personnel Committee supposed to do as they desire to be faithful to their responsibilities? The pastoral evaluation process described below provides a format that understands the assumptions and suggests a process that,

- is realistic—being grounded in what pastors are asked to do in 21st century ministry,
- is formative—accounts for strengths and growing edges with a plan of action for pastoral learning,
- is based on both personal reflection and deep dialogue—is done *with* not *to* the pastor,
- emphasizes mutual ministry—both pastors and elders evaluate *themselves* as the first step of dialogue,
- promotes trust—the pastor is invited to recommend members to the feedback group,
- rejects evaluations that are,
 - conducted in the midst of conflict,¹
 - tied to continued employment or salary increases / decreases.²

¹ As a response to conflicts within the congregation, performance evaluations are likely to be so colored by the intensity of the emotions that it will only further the discord. In addition, it is likely that those who like the pastor as well as by those who don't like the pastor will have a hard time being honest. Those who like the pastor may overlook areas where improvement is needed for fear of harming his or her reputation and those who dislike the pastor may overlook strengths for fear of losing ground on the issues that matter to them.

² The church should provide its servants with fair living wage for the work performed. However, to link compensation with the performance review is to suggest that excellence is tied to financial gain rather than to the calling to serve God. If the church can afford to pay cost of living increases, it should do so. If the church is thriving and growing, thus increasing the tasks of ministry, then compensation should be adjusted to reflect these greater responsibilities. If the church is in a state of decline and its finances are stretched such that it cannot increase or even maintain its staff salaries, then the larger problem of the church's sustainability is presented and should be addressed outside of the question of raising or lowering a pastor's salary.

Pastor Evaluation Themes

1. The ability to maintain personal, professional, and spiritual balance.
2. The ability to guide a transformational faith experience (conversion).
3. The ability to motivate and develop a congregation to be a “mission outpost” (help churches reclaim their role in reaching new believers).
4. The ability to develop and communicate a vision.
5. The ability to interpret and lead change.
6. The ability to promote and lead spiritual formation for church members.
7. The ability to provide leadership for high-quality, relevant worship experiences.
8. The ability to identify, develop, and support lay leaders.
9. The ability to build, inspire, and lead a “team” of both staff and volunteers.
10. The ability to manage conflict.
11. The ability to navigate successfully the world of technology.
12. The ability to be a lifelong learner.

Steps in the Process

Step #1 – Feedback Group: Churches often assign performance evaluations to a Personnel Committee, who may or may not know all that a pastor does. In addition to the official team designated to conduct evaluations, church members knowledgeable of the pastor’s work should be invited, including people the pastor trusts and requests be a part of the feedback group. The feedback group should be no less than three and no more than seven persons.

Step #2 – Choose Themes: Any attempt to discuss all twelve tasks in a single evaluation would be overwhelming both for the pastor and the church members conducting the evaluation. Therefore, each year no more than three or four themes should be discussed, on a rotating basis. If a time-sensitive or obvious growth area is mutually identified by the pastor and elders on Session, that theme can be added to the rotation for the given year.

Step #3 – Personal Reflection: To create a mutual dialogue, the first act of feedback is inward. Both pastors and feedback group members are invited to set aside time for personal reflection to ask *of themselves*, “How am I doing with what I am called to do?” Because pastors, elders and church members are a team, we must each do our part.

Step #4 – Evaluation: Feedback group members are invited to respond to their self-evaluation and the pastor’s evaluation using the following numerical scale in responding to the questions: 4—very effective; 3—effective; 2—not very effective; 1—not applicable. Space should be provided for comments after each question. Each member should be given several weeks to complete the forms to provide time for research, if needed. The completed forms are given to the chairperson of the committee or to that person's designee for compilation. The evaluation numbers are listed for each area on the compiled form, and the comments are listed under each characteristic being reviewed. The final, compiled version is provided to all members of the committee and to the pastor at least one week before the formal review.

Step #5 – Dialogue: A meeting between the feedback group and pastor should occur within one week of the final, compiled version of the report being provided to the pastor. At this meeting, focus should be on naming and appreciating strengths and discussing growth areas, recognizing that performance improvement often requires a team effort of elders, members and pastors working together. A growth plan that includes action items for the pastor and Session should be drafted following this meeting and submitted to Session for their review.

Elder Review Questions

Each Elder will reflect on and write answers to four questions each year of service. One portion of the Session meeting will be set aside to discuss the answers in small groups and as a whole the important issues that arise.

YEAR 1 Review Questions

Characteristic 1: The Ability to Maintain Personal, Professional, and Spiritual Balance

1. Do I perform my volunteer duties within a reasonable number of hours?
2. Do I conduct myself in a professional manner when serving the church in an official capacity?
3. Do I honor my status as a member of the congregation by participating fully in its life, not limiting my involvement to the areas in which I serve?
4. Do I maintain a spiritual life, including personal prayer and other devotional activities?

Characteristic 2: The Ability to Guide a Transformational Faith Experience

1. Am I comfortable talking about my faith with others?
2. Can I direct someone exploring faith for the first time to the programs of my church that might be of assistance?
3. Do I seek out new members of our church and find ways to make them feel included?

Characteristic 3: The Ability to Build, Inspire, and Lead a Volunteer Team/Committee

1. How have I contributed to building an active committee?
2. Do I understand how to moderate a productive meeting? (If not, am I willing to be trained?)
3. How have I helped each member of my committee to understand their role and responsibilities?

Characteristic 4: The Ability to Navigate Successfully the World of Technology

1. Am I proficient in basic computer skills?
 2. Can I use the Internet for research or communication related to my area of service?
 3. Am I able to receive and respond to electronic communication?
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YEAR 2 Review Questions

Characteristic 5: The Ability to Motivate and Develop a Congregation to Be a “Mission Outpost”

1. Am I aware of the specific population my congregation is trying to reach?
2. How have I been hospitable and welcoming to visitors?
3. Do I invite people to my church and encourage others to do so?
4. How does my area of service help people to be more effective evangelists?

Characteristic 6: The Ability to Interpret and Lead Change

1. Do I ask for the information I need to understand the rationale and steps for changes in my congregation?
2. Can I interpret the rationale for change to others?

Characteristic 7: The Ability to Provide Leadership for High-Quality, Relevant Worship Experiences

1. Do I actively support of the tasks in the worship service or offer helpful feedback on how I think it can be improved (music, ushering, liturgist, sound system, visuals)?
2. Am I familiar enough with worship to make a recommendation to someone inquiring about opportunities to get involved?

Characteristic 8: The Ability to Identify, Develop, and Support Lay Leaders

1. Whom have I nurtured into a new leader this year?
 2. How have I encouraged new members to use their gifts in the life of the congregation?
 3. In what specific ways did I support current leaders?
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YEAR 3 Review Questions

Characteristic 9: The Ability to Develop, Lead, and Communicate a Vision

1. Can I articulate the vision of our congregation?
2. Do I have a vision for my area of volunteer work?
3. Have I communicated this vision to the pastor and other volunteers?

Characteristic 10: The Ability to Promote and Lead Spiritual Formation for Church Members

1. Do I understand how my work furthers the spiritual development of members?
2. Do I recognize the spiritual gifts of others and encourage them to serve in my congregation?
3. Do I refer the names of those who may have gifts for service in the church to the appropriate person?

Characteristic 11: The Ability to Manage Conflict

1. Do I understand my own conflict-management style?
2. Do I understand my church's process for grievances?
3. Am I willing to ask for help in resolving a conflict?

Characteristic 12: The Ability and Desire to Be a Lifelong Learner

1. Do I have learning goals for this year?
2. Do I contribute to creating a learning community within the staff, leadership team, and congregation?
3. What workshops or other programs have I attended or books have I read that enhance the performance of my volunteer service?

Pastor Review Questions

The following questions correspond to the 12 characteristics of an effective 21st-century pastor. It is intended for use by the pastor to reflect upon the role and tasks of a leader in the context of the congregation's ministry. Space has been provided for additional reflections related to the pastor's responsibilities.

NOTE FOR ALL OF THE 12 CHARACTERISTICS: It may be necessary to adapt or modify questions for one or more of the 12 characteristics, especially for associate pastors, part-time pastors, or non-ordained staff. Churches are encouraged to make such modifications in coordination with their church staff as a means to encourage a healthy dialogue.

Characteristic 1: The Ability to Maintain Personal, Professional, and Spiritual Balance

1. How often do I engage in the following?
 - Personal prayer not related to role or function of ministry
 - Bible study not related to the practice of ministry
 - A private spiritual retreat
 - The practice of faithful stewardship
2. How often do I participate in worship where I am not the leader?
3. Do I have a spiritual director or spiritual friend with whom I meet at least monthly for prayer and reflection on my own spiritual journey?
4. Do I participate in an accountability/support group other than a ministerial association?
5. How many “days off” do I consistently take each week?
6. Do I take all my vacation?
7. Do I take at least one portion of it in a two-week block?
8. How much time a week is reserved for home life?
 - Four nights a week?
 - Two nights a week?
 - Saturdays?
9. For married pastors: How often do I have “date” nights or other regular opportunities for special time with my spouse?
10. For single pastors: Do I spend time with friends or other family on a weekly basis?
11. Do I have friends who are not members of the congregation?
12. Do I have a personal therapist or pastoral counselor identified for times of need?
13. Do I have an annual physical?
14. How is my diet and exercise?
15. Do I have interests or hobbies outside the church?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 2: The Ability to Guide a Transformational Faith Experience

1. How many new believers have I nurtured into a relationship with Christ in the past year?
2. Do I have contemporary translations of the Bible on hand that I can give away as needed?
3. Do I spend time in locations where I might meet individuals without a faith background?
4. Do I have a plan for developing new believers into mature disciples?
5. How many “mentors for new believers” have I equipped this year?
6. Does our congregation have an appropriate ritual of welcome for new members and a social event to welcome them into the congregation?
7. Do I encourage people new to the faith to invite their friends and family members into the faith as well?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 3: The Ability to Motivate and Develop a Congregation to Be a “Mission Outpost”

1. How many adult baptisms were performed in my congregation during the past year?
2. Is the leadership board clear about the target population this congregation is trying to reach?
3. Is the congregation clear?
4. Do I nurture those who have a gift for evangelism through one-on-one coaching or in small group settings?
5. Is there a formal plan for equipping members as evangelists in my congregation?
6. Have I prepared members to place the comfort of new believers above their own?
7. How many times have I preached in the past 12 months on the call to be evangelists?
8. How have we focused on being a hospitable and welcoming congregation?
9. Do we have parking spaces reserved for first-time visitors?
10. Do we have parking-lot greeters in addition to those who welcome at the church entrance?
11. To what extent is our Sunday school viewed as a tool for reaching neighborhood children and their parents?
12. Do our social-action ministries make a statement to the surrounding community that we care deeply for the poor, homeless, and marginalized people in our society?
13. Are these individuals welcomed into our church?
14. How have we collaborated with other congregations that see themselves as mission outposts in reaching the unchurched in our common community?
15. Do we have a plan for assimilating new members into the life of our congregation?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 4: The Ability to Develop and Communicate a Vision

1. Do I annually share my personal vision for the congregation with the formal leadership board of my church?
2. With the congregation?
3. Is our vision statement concise and easy to remember?
4. How is our vision kept before our membership (banners, letterhead, hymns, Web site, etc.)?
5. Is there a process of regular review and evaluation for the vision of the church?
6. What percentage of the congregation could articulate the vision statement?
7. How many sermons a year focus specifically on the congregation's vision?
8. Does our organizational structure equip and support the vision statement?
9. Is it easily modified?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 5: The Ability to Interpret and Lead Change

1. Have I adequately equipped myself with a working knowledge of change theory?
2. Do I feel competent in my diagnostic and planning skills for leading change?
3. Am I able to create a sense of urgency that will motivate our congregational leaders to consider the need for change?
4. Have I equipped the formal leadership board of the church to understand the dynamics of change?
5. Do I build in moments of celebration as we successfully complete small steps toward larger change?
6. Am I prepared to minister to those for whom the change, or pace of change, is difficult?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 6: The Ability to Promote and Lead Spiritual Formation for Church Members

1. Do I provide the opportunity for spiritual direction for those seeking a more intentional approach to their spiritual life?
2. Is my preaching focused on transforming lives and equipping disciples?
3. Am I personally involved in activities in the life of the congregation that promote spiritual growth (e.g., leading Bible study)?
4. This involvement will vary depending on the size of the congregation.
5. Has our ministry plan provided for multiple options for spiritual growth, recognizing different levels of spiritual maturity?
6. Do we have a process by which the spiritual gifts of each member are identified and encouraged?
7. Have I identified the gifts for ordained ministry or other church professions in others and challenged them to consider a “call”?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 7: The Ability to Provide Leadership for High-Quality, Relevant Worship Experiences

1. Have I participated in at least one continuing-education event focused on preaching or leading worship in the past year?
2. Is there sufficient diversity in worship (number of services or styles) to reach both believers and potential new believers?
3. Is our worship service understandable for those with little or no exposure to the faith?
4. Is our bulletin easy to follow, with all congregational prayers and responses printed?
5. Do we have a special service for those who are initial explorers of the Christian faith?
6. Is the music in worship relevant to the population we are trying to reach?
7. Am I up-to-date on generational theory and what younger generations are looking for spiritually and in a worshiping community?
8. Am I willing to reprioritize my pastoral tasks to make room for new services of worship that address new needs?
9. Am I willing to get out of my own comfort zone for the sake of reaching others?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 8: The Ability to Identify, Develop, and Support Lay Leaders

1. Whom have I nurtured into a new leadership position this year?
2. How have I encouraged new members to use their gifts in the life of the congregation?
3. What leadership training opportunities were provided for existing leaders?
4. How many workshops or conferences did I attend with congregational leaders?
5. In what specific ways did I support existing leaders?
6. How often did I meet one-on-one with key leaders to offer encouragement and support?
7. How did I fulfill my role as “coach” with leaders this year?
8. How often did I pray for the church's lay leadership team?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 9: The Ability to Build, Inspire, and Lead a Staff/Volunteer Team (Note: in smaller-membership congregations the staff may consist entirely of volunteers plus the pastor.)

1. How have I contributed to building a healthy workplace?
2. Can the members (both staff and volunteer) of our leadership team articulate the core values of the team?
3. Has our team developed (or reviewed) a staff covenant?
4. How often does the staff team meet?
5. How often does the staff meet with the volunteer team?
6. Are lines of accountability clear in staff and volunteer teams?
7. Which of the following components are regular parts of team life?
 - a. Prayer
 - b. Bible study
 - c. Opportunity for personal sharing
 - d. Reflections on our spiritual journeys
 - e. Critique and feedback (on events and professional performance)
 - f. Problem solving
 - g. Collaboration
 - h. Creative brainstorming for new ideas/possibilities
 - i. Learning opportunities (workshops, conferences)
8. How often do I meet one-on-one with individual members of the staff?
9. Are annual goals/plans subject to entire staff review?
10. What are my hopes for the staff team in the coming year?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 10: The Ability to Manage Conflict

1. Have I prepared myself to understand the dynamics of conflict in the church (continuing education, reading, etc.)?
2. Do I understand my preferred conflict-management style?
3. Is there a group of lay leaders responsible for resolving personnel issues?
4. Are personnel practices and policies
 - a. written down and available to all?
 - b. reviewed annually?
 - c. faithfully implemented?
5. Is there a clear process for resolving differences and/or lodging grievances?
6. Do I effectively use the leadership board of the congregation in resolving conflict issues in the larger church family?
7. Do I have a personal coach or mentor to whom I can turn when I am the focal point of conflict?
8. Do I understand the role and resources of my denomination in helping to resolve conflict?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 11: The Ability to Navigate Successfully the World of Technology

1. Am I proficient in basic computer skills?
2. Do I use email as a regular way of communicating?
3. Does our church have an up-to-date website?
4. Am I proficient in the use of presentation software (such as PowerPoint) as an educational tool and worship resource?
5. Are the pastor's Sunday sermons available on-line?
6. Do I have denominational resources and other ministry aids marked in my Web browser for quick referrals?
7. Do I have a clear understanding of the appropriate use of technology in the performance of pastoral care (email, website, prayer chains)?
8. Does the church office have voice-messaging capability?
9. Does the recorded message give an option for worship service information rather than subjecting all callers to a long recorded monologue?

ADDITIONAL REFLECTION

ACTION PLAN

Characteristic 12: The Ability and Desire to be a Lifelong Learner

1. Am I a student of the culture in which I live?
2. How many of the following do I do on a regular basis?
 - a. Go to the movies
 - b. Read contemporary novels
 - c. Read secular magazines
 - d. Listen to contemporary radio stations
 - e. Watch the most popular television program
3. Do I read widely in both church and secular publications?
4. In how many professional development opportunities do I participate in a year
 - a. One-day events
 - b. Three or four day conferences
 - c. Weeklong class or workshop
5. Do I have learning goals for myself each year?
6. How do I contribute to creating a learning community within the staff, leadership team and the presbyteries?
7. Do I take a sabbatical every four to six years?

ADDITIONAL REFLECTION

ACTION PLAN