

Evaluating Ministry

Principles and Processes for Clergy and Congregations

Evaluation is a daily occurrence in the life of the parish. Reflecting on how the pastor is doing, how the Sunday school teachers are doing, how the “church” is doing – all of this is part of what it means to be thoughtful, conscientious, caring people. Yet the idea of *formal* evaluation is often resisted – a scary and threatening idea for church professionals and lay leaders alike. Evaluations take time – a valuable commodity in busy churches. Pastors often fear that evaluations will reveal painful critiques of their leadership, or – even worse – be used to orchestrate their departure. The purpose of this instrument is to provide a type of ministry evaluation that can be healthy, life enhancing, and supportive of the gifts and talents of all who are engaged in the mission of a particular congregation.

The purpose of evaluation is not to prove but to improve. Evaluation can be considered an ongoing process that strengthens our ministry, giving us the opportunity to reflect periodically on how well we are fulfilling our commitments to Christ, the church, and one another. Excellence in ministry is not a one-person show. Therefore, no individual’s performance in ministry can be reviewed with fairness apart from the whole. Mutually reviewing ministry can result in revitalizing mission and re-energizing pastors and people. Regular review gives the feedback necessary to continue moving forward in confidence that what everyone is striving to achieve is a shared vision of the mission of the congregation in question.

Liturgy means “the work of the people.” In other words, the priesthood of believers means that *all* Christians are called to the work of ministry – not just those called to Word and Sacrament. Evaluation is one of God’s ways of bringing the history of the past into dialogue with the hope for the future. We are called into new growth and new ministries by taking a realistic and hopeful look at what we have been and what we can still become. Evaluations are always occurring, whether formalized or not. Therefore, to provide an orderly and caring process by which evaluation can occur gives integrity to the church’s desire to be faithful to its call and mission.

In evaluating our mutual ministry it is important that we keep in the forefront of our thinking the vision and behavior of the church in light of its story and the demands of the world. Evaluations should further equip us to carry the Gospel into the world. A theological understanding of justice demands that when review reveals our inadequacies or failures, opportunity for change and growth should be available. Evaluation brings with it the possibility for renewal, and it should never be used as a tool to tear down the Body of Christ but as one that strengthens and builds up all who serve it.

Procrastination is one of the greatest enemies of evaluation. Whatever the resources you use to help you in planning and evaluation, don’t allow yourselves to become immobilized because one or the other is not in place. Evaluation and planning are two sides to the same coin. It matters less *where* you start than that you start at all.

One of the greatest pitfalls for evaluations is tying the process to compensation issues. If performance isn’t satisfactory, it should be dealt with straightforwardly – not punished by jeopardizing the financial security of the pastor and his/ her family. Evaluations are most helpful during times when things are going well, not when conflict looms large. Reviewing the pastor’s ministry along with that of the congregation minimizes the anxiety an evaluation creates. There are times when it is appropriate to focus a review just on the pastor’s effectiveness.

Evaluation is a difficult job and it takes a lot of time. It takes dedication, patience, and understanding, but it is an extremely worthwhile learning and growth enhancing experience. If it would be helpful, the evaluation process could include the input of others outside of the Joint Board -- individuals who represent a cross section of the congregation. In consultation with the pastor, the Joint Board considers age, marital status, sex, and philosophy in asking other individuals to become a part of the process so that most of the points of view within the congregation will have representation. As each individual goes about his/her task, ask yourself as you consider a specific area of the pastor’s responsibility, “What would the best possible performance look like?” and “What

would the worst possible performance look like?” Remember that your purpose is not to give a good score and it is not to tear down the pastor. Rather, this process is to help evaluate the performance of the pastor. Remember – it would not be unusual for the pastor to approach this process with some apprehension. Obviously, a climate of mutual trust is necessary.

After the evaluation process is completed, it will be necessary to identify areas where further training, continuing education, or changes in direction appear to be in order.

Used with care and sensitivity, evaluation can strengthen all aspects of ministry and may even save a tenuous relationship between pastor and parish by addressing needs before they become issues. Evaluation and review are most effective when the congregation and pastor are engaged in a mutual process. Evaluations work best when they are part of a regularly scheduled process of measuring effectiveness. When discussion and feedback are expected as a normal part of life together, the anxiety about such a process is greatly reduced. Comprehensive reviews of a pastor’s performance are not helpful when major conflicts are present. Using evaluation as a weapon against a pastor is never acceptable.

Compensation reviews for ministers should not be held in conjunction with performance reviews. The evaluation of a pastor is most helpful when the minister requests it. Planning the process in such a way that the pastor being reviewed can contribute to the design also leads to ownership on the part of all. A design that is tailor-made to fit the particular situation is often better than a packaged process. It is often advisable to adapt existing models or design one’s own to meet the needs for meaningful evaluation. Thus, please feel free to adapt the attached instrument to your own particular situation. An outside consultant might be of assistance. Focus on positive as well as negatives. It is just as important to identify what a congregation and a pastor are doing *well* as it is to discover what can be improved. Be clear from the beginning what will happen as a result of the evaluation. Nothing feels worse than to be part of a process and never know what happened as a result of it. Finally, provide a system for monitoring decisions. Mutual accountability and a periodic check on “how we’re doing” can go a long way in assuring that the decided upon changes will occur.

INSTRUCTIONS FOR COMPLETING THIS FORM

1. Please take sufficient time to complete the instrument that follows
2. Be as objective as possible
3. Complete all pages EXCEPT the page entitled “D. GOALS AND EXPECTATIONS”
4. Once the collation of all completed forms has occurred, the basis for completing the omitted page will be in place and that page will be completed in group format
5. Remember the purpose of this process – to enhance ministry and mission within the congregation

PASTORAL PERFORMANCE EVALUATION

| | |
|---------------------------------|--|
| Name of Pastor Being Evaluated: | |
| Evaluation Date: | |
| Date of Last Evaluation: | |
| Name of Evaluator: | |

EVALUATOR: Check the statement that most closely describes the pastor

A. MECHANICS

1. **Professional Understanding** (consider how he/she is equipped with the skills essential to the performance of his/her work as a pastor)
 - a. ___ Inadequate understanding of the role of pastor
 - b. ___ Lacks knowledge of some common pastoral questions
 - c. ___ Moderately equipped, can function effectively in most scenarios
 - d. ___ Well informed, good understanding of what it means to be a good pastor
 - e. ___ Has exceptional grasp of all phases of pastoral ministry

2. **Continuing Education** (consider willingness to attend continuing education events and how well she/he applies knowledge gained in training)
 - a. ___ Never attends Continuing Education events
 - b. ___ Attends a few events but complains about the need to attend
 - c. ___ Attends acceptable number of events but does not apply principles of the events
 - d. ___ Attends most events and usually applies principles
 - e. ___ Attends events regularly and demonstrates excellent skill in applying principles

3. **Quality of Work** (consider accuracy and effectiveness regardless of volume)
 - a. ___ Exceptionally effective, practically no problems
 - b. ___ Very few complaints, consistent
 - c. ___ Meets minimum requirements
 - d. ___ Frequently ineffective
 - e. ___ Totally ineffective

4. **Aptitude for Pastoral Care** (consider ability to meet changing conditions and to solve novel or problem situations)
 - a. ___ Requires extremely detailed guidance and reminders
 - b. ___ Requires more than average explanations
 - c. ___ Grasps conditions with average ability
 - d. ___ Usually quick to respond to needs
 - e. ___ Exceptionally keen and alert to pastoral needs and creatively responds to unique situations

5. **Versatility** (consider ability to change tasks as the circumstances warrant)
 - a. ___ Highly flexible
 - b. ___ Adjusts quickly
 - c. ___ Satisfactory in ability to change and adjust
 - d. ___ Finds it difficult to change or adjust
 - e. ___ Considerable difficulty in making adjustments

6. **Punctuality and Attendance** (consider faithfulness in coming to work daily, having office hours, and conforming to those office hours)
- ___ Almost never absent or late except for pastoral emergencies; nearly perfect record
 - ___ Very prompt, keeps appointments
 - ___ Usually present and on time and keeps posted hours
 - ___ Lax in attendance and/or following office hours
 - ___ Frequently late and often absent from posted office hours
7. **Creativity and Initiative** (consider talent for discovering better ways of doing things and the ability to work and proceed without having every detail laid out)
- ___ Initiative and creativeness results in frequent savings in resources (time, money, people)
 - ___ Progressive in that she/he often suggests new and more efficient ways of doing things
 - ___ Sometimes makes suggestions; occasionally shows initiative
 - ___ Occasionally has new ideas but rarely show initiative
 - ___ Rarely has new ideas, lacks initiative, performs only the routine
8. **Attitude and Cooperation** (consider his/her attitudes toward work, co-workers and the denomination as well as encouraging team playing)
- ___ Significant improvement required
 - ___ Cooperates reluctantly; argumentative
 - ___ Acceptable to others; meets minimum requirements
 - ___ Gets along well with others; has a healthy attitude
 - ___ Goes out of her/his way to get along well; sets a good example
9. **Dependability** (consider the manner in which he/she applies himself/herself and her/his ability to do required tasks well)
- ___ Requires constant reminder
 - ___ Needs more reminding than others
 - ___ Can be trusted to do the task with routine monitoring
 - ___ Applies self so that very little reminding needs to occur
 - ___ Justifies utmost confidence; carries out all details
10. **Friendliness** (consider the sociability and warmth she/her imparts to members and co-workers)
- ___ Extremely sociable; excellent at establishing goodwill
 - ___ Very sociable and outgoing
 - ___ Warm, friendly, sociable
 - ___ Approachable and friendly once he/she is known by others
 - ___ Very distant and aloof

B. PASTORAL SKILLS

1. **Worship Preparation** (consider the outline and flow of the order of worship)
- ___ The entire order of worship is totally and fully interwoven around one theme and it is obvious that care was taken to relate hymns, musical accompaniment, and choir music with the scriptures and meditation
 - ___ The order of worship flows quite well and the hymns relate to the scriptures and message
 - ___ The order of worship flows
 - ___ The choir music and accompaniment do not seem to fit the message but the hymns do
 - ___ There appears to be no relevance between hymns, scriptures, message, etc.

2. **Sermon Preparation and Delivery** (consider the flow of the message, the use of illustration, the appropriateness of the subject matter, the relationship of the message to the scripture)
 - a. ___ The message is usually a disaster and does not hold the attention of the congregants
 - b. ___ The message is usually mediocre, at best, but does relate to the theme of the scripture
 - c. ___ The message is usually well prepared and of interest
 - d. ___ The message is usually very well thought out, is theologically solid, and provides a clear challenge to the congregants
 - e. ___ The message is almost always a home run

3. **Administrative Duties** (consider office organization, staff oversight, report preparation, time management)
 - a. ___ The pastoral office and the church office are run with exceeding efficiency, all reports are professionally done and done on time, other staff are treated with utmost respect
 - b. ___ The administrative duties are handled professionally and with efficiency
 - c. ___ The administrative duties are covered but not with much enthusiasm
 - d. ___ Most administrative duties are accomplished only reluctantly
 - e. ___ Organization??? Time management??? Report Preparation??? What's that??? Our pastor makes very little effort to cover administrative duties

4. **Pastoral Care** (consider the pastor's presence with parishioners at the crucial times of life, his/her willingness to be attentive to the important events in the lives of parishioners, his/her ability to relate to all generations)
 - a. ___ The pastor is almost never available for counsel or visitation and never attends events relating to the lives of parishioners
 - b. ___ The pastor does a minimum of pastoral care work but does not show much enthusiasm
 - c. ___ The pastor is relatively faithful in visiting the sick and shut ins and hospitalized
 - d. ___ The pastor is always enthusiastically available when needed
 - e. ___ The pastor has terrific pastoral skills and is anticipatory and avails himself/herself of the pastoral opportunities for members

5. **Programming** (consider the areas of outreach, stewardship, evangelism, Christian Education, fellowship events, etc.)
 - a. ___ The pastor models tithing, leads excellent Bible studies, empowers and affirms teachers and choirs and leaders within the congregation, provides inspirational leadership to boards and committees, encourages stewardship principles, and inspires evangelism and outreach by members
 - b. ___ The pastor inspires others in the programming area but is not always seen as participatory
 - c. ___ The pastor does not share the leadership in programming but does a relatively good job at it herself/himself
 - d. ___ The pastor reluctantly does the necessary duties surrounding programming
 - e. ___ Our programming suffers significantly because of the lack of leadership by the pastor

6. **Rites and Sacraments** (consider baptisms, holy communion, weddings, funerals, etc.)
 - a. ___ The pastor and involved individuals are often unprepared for the event (pastor seems clueless)
 - b. ___ The pastor seems to go through the motions with very limited expressions of warmth
 - c. ___ All rites and sacraments are covered as necessary
 - d. ___ The pastor seems excited with each individual rite and sacrament
 - e. ___ Involved individuals are well prepared and it is obvious that they appreciate the pastor's leadership and warmth

7. **Fellowship, Denominational, Community** (consider community involvement, denominational loyalty, fellowship events, and the pastor's own family life)
- a. ___ The pastor often speaks negatively about the denomination, the community, and even our congregation – gives the impression that he/she is very unhappy with us and with the Moravian Church – has no concept on how to handle conflict
 - b. ___ The pastor seems to grudgingly support community and denominational ministries
 - c. ___ The pastor participates in community and denominational events when pushed to do so
 - d. ___ The pastor attends denominational events and can be seen at many events in the community – he/she seems happy to be here and does pretty well with conflict and taking time for self and family
 - e. ___ I am proud to be able to introduce my pastor to my friends and associates because he/she is such a positive role model and makes others feel at ease; she/he is well respected and encourages us always to be mindful that we are part of the larger Moravian Church; he/she models healthy family life; he/she takes time to renew and refresh her/himself; handles conflict in a very healthy manner

C. GENERAL COMMENTS – Please describe your personal impressions of you pastor. Include any specific examples that influenced your conclusions and outline any special traits which are otherwise not covered in this evaluation instrument but which you think are important.

D. GOALS AND EXPECTATIONS – Please list new goals and expectations to be achieved by your pastor in the year ahead – goals and expectations which have been mutually arrived at by the pastor and the Joint Board. Consider areas where performance improvement is needed when establishing goals. An ideal scenario would be to agree to three or four goals and expectations for the year ahead.

This evaluation was discussed with the pastor on _____, 20____. Pastor's comments:
(attach a separate sheet if space is insufficient)

Employee's Signature indicating only that the evaluation has been reviewed with me – it does not necessarily signify my concurrence.

OUR CONGREGATIONAL EFFECTIVENESS

Again, please read each statement and indicate the extent to which you agree or disagree by providing a number for that statement according to the following scale:

- 1 – Strongly Disagree
- 2 – Disagree
- 3 – Middle of the Road
- 4 – Agree
- 5 – Strongly Agree

Remember, this part of the questionnaire reviews the congregation as a whole (not the pastor.)

FULFILLING OUR PURPOSE AND MISSION

___ We have a congregational community that can depend upon each other and take responsibility for each other.

___ We feel a greater unity beneath our diversity, a God who inspires us. We pay attention to God and we celebrate the diversity we experience in God.

___ We are devoted to our larger purpose as a community of faith.

___ We know our congregation's sense of mission and it helps to order our responsibilities and priorities.

INSPIRATIONAL LEADERSHIP

___ Congregation members show concern for our essential values by asking questions and discussing issues in depth.

___ Members of our congregation share their deepest experiences.

___ Members of our congregation live out their religious values in a way that provides role models for others.

___ Members speak out in congregational meetings and committees and not behind the backs of others.

PRACTICAL LEADERSHIP

___ People think about the needs of the congregation as a whole. They offer suggestions and request programs that they like. They organize the activities they want to happen.

___ Lay leadership cooperates with minister.

___ Lay leadership cooperates with the Christian Education staff (Director, teachers, etc.).

___ Lay leadership cooperates with other staff.

GENERAL STAFFING

___ Members volunteer for committees and positions to staff our ongoing work. They follow through with their responsibilities.

___ Members of committees cooperate well. They understand the whole job and coordinate their individual roles.

___ Members care about their work for our congregation. They anticipate problems and find solutions.

___ We pitch in and support the initiatives of our congregational leaders.

TAKING CARE OF FACILITIES

___ Our congregation's buildings and grounds are maintained properly.

___ The interior of the church is comfortable, beautiful, and inviting.

___ Furnishings are appropriate for the use of the space.

___ Supplies are well provided.

FINANCES

- ___ We allocate funds appropriately so that working budgets adequately cover expenses as they occur.
- ___ Budgeting allows for items that may not be practical necessities, but have esthetic or human value.
- ___ We canvass effectively, reaching everyone in our congregation.
- ___ We pledge financial support and we meet our commitment.
- ___ We design effective fundraising projects, staff them with enough people, and bring in the funds that we need.

BUDGETING TIME AND ENERGY

- ___ The congregation uses its human resources wisely, prioritizing projects and distributing responsibility widely.
- ___ We have procedures for handling the recurring situations in our life as a congregation so that committee members don't have to reinvent the process each time.

COMMUNICATION PROCESS SKILLS

- ___ People communicate ideas and feelings relevantly and appropriately.
- ___ We think about the needs of others and support the goals of others, knowing that their goals also arise from deep values.
- ___ The congregation facilitates communication and cooperation among members and builds team spirit.
- ___ In meetings we do business efficiently while paying attention to cooperative values such as sharing leadership and listening to those who want to speak.

WORSHIP

- ___ Our congregation regularly provides opportunities for worship that are appropriate to the needs of our people.
- ___ The subject and styles of our worship services address the needs of the whole person.
- ___ We seek out all sources for inspiration and guidance.
- ___ Lay people participate in a variety of roles in worship.
- ___ Musical elements of worship are satisfying.
- ___ The congregation attends worship faithfully.

CHRISTIAN EDUCATION FOR CHILDREN AND YOUTH

- ___ Programs are well balanced, relevant, and involving. They stimulate personal, emotional, and spiritual development.
- ___ Teachers' attitudes are supportive, caring, and open minded. They have good rapport with children and youth.
- ___ Programming and staffing are appropriate. Teachers are good at what they do; there are enough teachers; classes are the right size.
- ___ Parents support the Christian Education program by getting their children to Sunday School and other educational programs regularly.
- ___ The congregation supports the Christian Education program for children and youth by volunteering services.
- ___ Children and young people support their Christian Education programs with attention, feedback, and suggestions.
- ___ Youth take charge of activities for themselves; teachers and staff empower them and support their leadership.

ADULT CHRISTIAN EDUCATION PROGRAMS

- Adult Christian Education programs are well balanced, relevant, and involving. They stimulate our personal and spiritual growth.
- The congregation supports adult Christian Education with feedback and suggestions.
- The congregation supports adult Christian Education through sharing leadership and resources.

OUTREACH

- We create a climate of acceptance and friendliness at our congregation. The place looks inviting and it is easy to find one's way around.
- We have an active program for welcoming and orienting new members.
- Congregation members greet new people and follow up with contact.
- We provide activities for assimilating new members into our congregational community.
- We publicize our activities to let the wider community know what we are offering.
- We tell our friends what we like about our church and invite them to come with us.

FUN AND FELLOWSHIP

- People keep in touch with each other.
- We take advantage of social functions to nurture relationships informally.
- We support the congregation's need for social fellowship with attendance at social events.
- We pay attention to individuals' needs and create a sense of community, caring, and mutual concern within the congregation.

SOCIAL JUSTICE

- Congregation members take an active part in community affairs, express a concern for social well being, and get involved in social issues.
- We take part in interfaith social projects and events.
- We offer educational programs on social justice issues.

DENOMINATIONAL AFFILIATION

- We inform ourselves about the history, issues, and values of our religious heritage.
- We keep in touch with current developments in our District and in the Province and Unity.
- We get involved, both as a church and as individuals, in denominational activities.

ATTITUDES

- We remember to emphasize the positive. We offer constructive feedback and give credit for jobs well done.
- We respect differences, particularly the diversity of our membership.
- We believe in each other, our essential unity, and our ability to work together with good will even when we differ.
- We keep a sense of humor.
- We cultivate enthusiasm and zest.
- We respect the goodness in everyone.
- We believe people have the power and responsibility to make their own decisions and we encourage them to do so, seeking God's will in their lives.
- We believe that people deserve to be happy as well as good. We give friendship, share our sources of spiritual strength, and listen well to them.
- We believe in ourselves and in the value of the work that this congregation does.