



Covenant for Vital Ministry

Evaluation Process for Pastors and SPRCs

Evaluation is a continuous process for formation in servant ministry and servant leadership that must take place in a spirit of understanding and acceptance. Evaluation serves as a process for pastors to assess their effectiveness in ministry and to discern God's call to continue in ordained ministry. . . The pastors in local churches shall participate annually in an evaluation with the committee on pastor-parish relations for use in an ongoing effective ministry and for identifying continuing education needs and plans. The Book of Discipline, 2004, ¶350

The "Covenant for Vital Ministry" evaluation process involves three steps:

1. The clergy person does a self-assessment.

The sheets titled "Essential Qualities, Skills and Competencies for Effective Clergy Leadership" and "Self-Assessment for Vital Ministry" are resources for this step.

The questions are intended to guide you through a process of reflection about your ministry and your life, and it is suggested that you set some time aside when you can give this focused attention.

2. There is a meeting between the clergy person and the SPRC to discuss the self-assessment together and provide feedback.

The sheets labeled "Guideline for Pastor and Staff-Parish Relations Committee," "Rules for Feedback," and "Receiving Feedback" are resources for this step.

3. After discussion together, the clergy person and SPRC complete "A Common Understanding for Our Ministry Together" and return copies of that document and the Self-Assessment to the Western District office.

This evaluative tool begins with the clergy person's self-assessment, and seeks to create a situation where, "in a spirit of understanding and acceptance," a discussion can take place between the clergy person and the SPRC aimed at improving the ministry of the whole church. (We hope to develop a congregational assessment piece in the future. It is not yet available.) This tool seeks to avoid an understanding of evaluation as a performance review by an outside authority. For those reasons, I commend it for your use. However, if you think that there is currently an atmosphere in your congregation or your SPRC that would not allow for a "spirit of understanding and acceptance," please let me know and we will discuss other evaluation options.

Kate

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Essential Qualities, Skills & Competencies For Effective Clergy Leadership

The Essential Qualities and Characteristics of Effective Clergy Leaders

- **A relationship with the Triune God**
A personal sense of connection with God is an essential characteristic of the spiritual life of one who is called into ministry. An effective clergy leader integrates this personal experience of God with the life of the church, and by so doing helps facilitate others' relationships with God as well.
- **A perfecting spirituality**
Spiritual leadership requires openness to God cultivated by a disciplined spiritual life of prayer, worship, spiritual attentiveness, and actions of caring and justice. These practices help clergy develop self-knowledge, compassion for others, and solidarity with God's creation. The desire to continue to grow in grace through lifelong learning enhances effective clergy leadership.
- **Integrity**
An effective clergy leader possesses honesty in communication and relationships, thus building a growing sense of trustworthiness in the community. S/he develops an integration of mind, body, soul, and heart which leads to a wholeness of person and acts as a firm foundation throughout life's challenges.
- **A caring heart**
A servant leader communicates the love of God through qualities of genuineness, empathy, compassion, and presence. This kind of servant leadership seeks to empower others to grow in grace and in the likeness of Christ, and to claim their own call to discipleship and to the work of reconciliation and social justice.

The Skills and Competencies of Effective Clergy Leaders

- **Proclamation**
Through preaching, teaching, liturgy, sacrament and service, and other forms of proclamation, clergy must communicate and apply the gospel of Jesus Christ to the needs and realities of the day, including prophetic witness. Effective proclamation includes the ability to invite others on a spiritual journey and make available the unique contribution of United Methodist heritage, including a combination of scripture, tradition, reason and experience.
- **Pastoral relationships**
An effective clergy leader possesses the necessary skills to engage all persons with respect; to listen, develop working teams, equip and partner with the laity for ministry, and to manage conflict in ways that lead to healthy resolution. S/he is able to differentiate and separate personal agendas from professional responsibility and practices confidentiality.
- **Vision, Organization and Administration**
An effective clergy leader possesses administrative, management, listening, and visioning skills that allow him or her to relate the movement of the Holy Spirit to the life of the church, and to empower the church to follow that movement of the Holy Spirit in making disciples and transforming the world.
An effective clergy leader within the United Methodist Church accepts, respects, and supports the doctrines, mission and administrative requirements of the United Methodist Church connectional system.
- **Self Care**
An effective clergy leader possesses the time management skills that allow for a healthy balance among work, family, and self-care responsibilities. Self-care includes the ability to define and establish appropriate boundaries, to keep personal perspective when working through conflict situations, and the ability to integrate life-long learning goals into the fabric of work and life.

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Self-Assessment for Vital Ministry

Name: _____ Ministry Setting: _____

The purpose of the Self-Assessment for Vital Ministry is to enhance your ministry and to increase the effectiveness of your congregation's ministry through deeper, ongoing conversation among clergy, staff-parish relations committees and district superintendents. The assessment begins with you.

The questions below will guide you through a process of reflection about your ministry and your life. The best setting for reflecting on them is a place apart. You are encouraged to spend a day in a quiet place where you can prayerfully and thoughtfully reflect on your ministry over the past year.

The apostles gathered around Jesus, and told him all that they had done and taught. He said to them, "Come away to a deserted place all by yourselves and rest." For many were coming and going, and they had no leisure even to eat.
-- Mark 6:30-31

These questions draw on the list of essential qualities, characteristics, skills and competencies for effective clergy leadership found on the previous page. Please attach additional pages as needed with your reflections.

Reflection on qualities and characteristics of effective clergy leaders:

- **A relationship with the Triune God:** What has been the nature of my personal relationship with God this past year? How has my experience of God as Creator, Christ, and Holy Spirit deepened or changed? Have I been able to share that relationship with others in ways that aided their personal relationship with God? Have others' sharing aided me in my relationship?
- **A perfecting spirituality:** What spiritual practices have been most life-giving for me? In what ways do I want to grow in my spiritual practices? What experiences, either planned or providential, have helped me grow in grace this past year?
- **Integrity:** Have I been able to be honest and transparent with the congregation this past year? In what ways have I experienced wholeness and integrity within myself and in my relationships? What are the areas of struggle for me?
- **A caring heart:** In what ways have my relations with others embodied genuineness, empathy, compassion, and presence? Which of these qualities come naturally and which do I have to be conscious of doing? Are there conditions that make it easier for me to show a caring heart and conditions in which it is harder? In what ways do I identify myself as a servant leader? Have others been empowered in their discipleship as a result of my caring?

Reflection on the skills and competencies of effective clergy leaders:

- **Proclamation:** Where have I seen evidence of the effectiveness of my proclamation of the gospel? In which of the possible arenas of proclamation (preaching, teaching, worship leadership and other forms of prophetic witness) do I feel most comfortable? In what areas have I felt a season of “dryness” and the need for renewal? Have others felt called to embark on their spiritual journey or been renewed in their ongoing journey as a result of my work of proclamation?
- **Pastoral relationships:** How would I characterize my pastoral relationships within my congregation? Have these relationships resulted in working teams, persons able to claim their gifts and ministry, and our community being able to engage conflict in ways that led to healthy resolutions? Have I maintained appropriate boundaries and confidentiality? Where have I felt disconnected and alone? Are there relationships in which I have I felt at odds or stuck?
- **Vision, Organization, and Administration:** How have I shared a vision of God’s call to be the church? Where have I felt bold in my leadership? What administrative, management, listening and visioning skills do I possess? What skills do I not possess but feel are needed? Have I encouraged others who have those skills to catch the vision and to use their gifts and passions to serve? Are there “objective” measures of our congregation’s success in making disciples (e.g. increases in average worship attendance, growth in membership, growth in percentage of apportionments paid, growth in program/mission)? Is there other evidence of our growing understanding of being church? Am I comfortable with the doctrines, mission and administrative requirements of the United Methodist Church? Have I helped the congregation claim and celebrate the heritage and connectional system of the United Methodist Church? What are the stumbling blocks for me and the congregation as we seek to be faithful to God’s call to make disciples and transform the world?
- **Self Care:** How much time and in what manner have I provided for the rejuvenation of my body, mind, and soul? What practices have I maintained that allow for a healthy balance among work, family and self-care responsibilities? What are my body and my moods telling me about how successful I have been at caring for myself? Do I have particular physical, emotional, or relationship health concerns?

Summary Rating of Skills and Competencies
(Please rate for both achievement and priority)

<u>Skills and Competencies</u>	Achievement					Priority				
	Exceptional		Needs Improvement			High Importance		Low Importance		Not Part of My Role
Proclamation	5	4	3	2	1	5	4	3	2	1
Pastoral Relationships	5	4	3	2	1	5	4	3	2	1
Vision	5	4	3	2	1	5	4	3	2	1
Organization & Administration	5	4	3	2	1	5	4	3	2	1
Self-Care	5	4	3	2	1	5	4	3	2	1

Continuing Formation Plan

In relation to the qualities and characteristics of effective clergy leaders:

- What one or two goals (new or continuing) can I set for myself to enhance my personal qualities and characteristics for ministry?
- How will I measure whether these goals have been met?
- Who will support me in achieving these goals?
- In what spiritual formation or personal growth experiences will I participate to achieve these goals?

Goal -- _____

Criteria for measurement -- _____

Supportive partner -- _____

Action/Experience to achieve goal -- _____

Goal -- _____

Criteria for measurement -- _____

Supportive partner -- _____

Action/Experience to achieve goal -- _____

In relation to the skills and competencies of effective clergy leaders:

- What one or two goals can I set for myself that will be most important in strengthening my skills and competencies for the coming year?
- How will I measure whether these goals have been met?
- Who will work with me to meet these goals?
- In what continuing education experience can I participate to strengthen my skills and competencies?

Goal -- _____

Criteria for measurement -- _____

Supportive partner -- _____

Action/Experience to achieve goal -- _____

Goal -- _____

Criteria for measurement -- _____

Supportive partner -- _____

Action/Experience to achieve goal -- _____

Reflecting on Church's Goals

- If my church set goals in this past year, how would I assess my church's effort to reach those goals?
- How has my leadership enhanced the church's ability to reach goals we have set?
- What are the stumbling blocks we have experienced as we have attempted to achieve goals we have set? Do we have blocks to even setting goals?
- Do we have specific goals this next year for worship attendance, professions of faith, confirmation class enrollment, new members, total membership numbers, payment of apportionments? If so, do we have strategies or plans by which we hope to achieve these goals?
- Are there other ways by which we assess the health of our congregation? Do I provide leadership in reflecting upon the health of our congregation and ways in which we might grow in discipleship?

Is there any additional information I would like to share with the Staff-Parish Relations Committee?

Connectional Communication

- In what setting do I hope to be in ministry for the 2009-2010 appointment year?
- Is there any additional information I would like to share with the district superintendent and/or the bishop?

Signed _____ Date _____

Shared with Staff-Parish Relations Committee on (date): _____

Please return this *Self-Assessment for Vital Ministry* and the *Common Understanding for Our Ministry Together* to the district superintendent at your charge conference or to the district office no later than December 15, 2008.

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Guidelines for Pastor and Staff-Parish Relations Committee

The underlying belief of the *Covenant for Vital Ministry* process is that the ministry of making disciples belongs to all believers. The pastor and members of the Staff-Parish Relations Committee are understood to be companions in ministry, not judges of one another's ministry. Everyone shares responsibility for the quality of ministry that happens in the church. In this process the pastor, the Staff-Parish Relations Committee, and the District Superintendent each has a special role.

The process is initiated by the clergy person. We value clergy and understand that they are called and set apart by God. Their ministries of Word, sacrament, order, and service give leadership to the ministry shared by the believers in each congregation. This process honors their calling and identity by encouraging each clergy person to guide the assessment of his or her role and ministry. **This assessment is a self-initiated process by the clergy for the purpose of being effective in ministry.**

We value the Staff-Parish Relations Committee as partners in ministry and a vital link between the pastor and staff of a congregation and its members and community. In this process their special role is to offer feedback. Feedback is a process of communicating what one experiences and observes. Therefore, the SPRC will not "evaluate" the clergy. Instead the pastor and the SPRC will share in a feedback session what they are observing about the ministry that is shared by the congregation and the clergy.

We value the District Superintendent for their ministry of oversight carried on throughout the Annual Conference. A part of this ministry is appraising the clergy and churches within their districts. **Appraisal is a process of measuring how clergy and congregations are fulfilling the mission of the church.**

The following suggestions are offered as guidelines for the feedback session for the pastor and the Staff-Parish Relations Committee:

- Plan adequate time for this gathering; save other SPRC business for another time. Meet in a setting where the pastor and the SPRC will feel comfortable, beginning perhaps with a shared meal.
- Open with prayer and devotional time focusing on the call given to each person to be in ministry in the name of Christ.
- The pastor should prepare copies of his/her written *Self-Assessment for Vital Ministry* for all members of the committee at least 2-3 days ahead of the meeting.
- The pastor begins by sharing pages 1-2 of the *Self-Assessment*. The committee members offer feedback to the pastor with a focus on affirmation of agreement and honest feedback on areas of disagreement or concern.
- The SPRC may share their view of the entire ministry of the congregation from their perspective.
- The pastor then shares from pages 3 and 4 of the *Self-Assessment*. The pastor and committee share regarding goals for ministry and plans for growth and professional development.
- The pastor and SPRC together complete *A Common Understanding for Our Ministry Together*.

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Rules for Feedback

- **Focus on behaviors (what the person did) or outcomes (what resulted). Do not focus on traits (for example, “helpful,” “cooperative”).** For example, don’t say, “You are an inspirational pastor.” While such global comments may sound nice, they don’t provide the pastor with specific, helpful feedback. Rather, you might say, “The staff-parish relations committee particularly appreciates the way you relate Scripture lessons to contemporary issues. For example, your sermon on the forgiveness of Jesus and its application to dealing with unfairness in our daily lives was particularly inspirational.”
- **Give “I” or “We” messages and avoid characterizations.** For example, rather than saying, “You are too indifferent in dealing with parishioners’ personal problems,” you could say, “When you tell parishioners’ that you are too busy to meet with them, we (they) feel that you don’t care.” The first statement is a generalization and tends to evoke a defensive reaction. The second approach speaks about a specific action and does not characterize the person as being indifferent. It expresses your feelings, and it invites the person to respond rather than to argue.
- **Be specific in providing feedback.** Most people require specific examples in order to correct or reinforce their behaviors.
- **Be honest in providing feedback.** Feedback should not be used to manipulate or to pacify.
- **Confine feedback narrowly to the behaviors that affect you as the parish or that are appropriately within your role as a parishioner.** For example, don’t comment on the way the pastor fulfills his or her role as a parent. This is not the business of the staff-parish relations committee, unless it has immediate and direct implications for the church.
- **Describe behaviors or outcomes and your reaction to them.** Effective feedback is descriptive; it does not label behavior as good or bad.
- **Time feedback well so as to be constructive and informative, rather than destructive or embarrassing.**
- **Direct feedback toward behaviors that the receiver can reinforce or change.**
- **Deliver feedback in an appropriate balance of positive and negative.**
- **Provide feedback on a frequent basis.** It should be an ongoing activity, not a once-a-year event.
- **Be sure that feedback is a two-way process.**
- **Remember the following when you hear a grievance about the pastor:**
 - Do not rely on hearsay (if possible), and never simply relay anonymous information.
 - Realize that what makes one person unhappy may be precisely what another person likes about the pastor.

- Don't assume that if a need is not being met, it is the pastor's fault. Engage the pastor in dialogue as part of the regular communication process. If need be, the concern should be raised again in the annual formalization of feedback process.

References

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Robbins, S.P. *Training in Interpersonal Skills*. Englewood Cliffs, NJ: Prentice Hall, 1989.

Wexley, K.N. and Latham, G.P. *Developing and Training Human Resources in Organizations*. New York: Harper Collins, Inc., 1991.

Whetten, D.A. and Cameron, K.S. *Developing Management Skills*. New York: HarperCollins Publishing, Inc., 1993.

Adapted from workshop materials prepared by Jane Giacobbe-Miller, former chairperson of the staff-parish relations committee, Wesley United Methodist Church, Amherst, Massachusetts, for district training of staff-parish relations committees and pastors in the Central Massachusetts District, New England Conference, The United Methodist Church. Used by permission.

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Receiving Feedback:

Sample Questions to Assist in Hearing and Processing Feedback

Clarifying Questions

- “Can you give an illustration when you may have observed this happening?”
- “Let me repeat what I think you said to be sure that I am hearing accurately.”
- “Am I correct in my understanding that . . . ?”

Decision-Making Questions

- “If we were to change what you have been describing, what would it look like? What would need to be done? Who might do it?”
- “Should I consider dropping this ministry, receive continuing education, or delegate this responsibility to someone else?”
- “Are my feelings/perceptions/observations on target? Are they an appropriate guide for future decisions?”

Consensus-Testing Questions

- In instances where only one person has contributed an idea: “I respect Mary’s opinion about this, and I would like to go with her insight. But before I do, I need to hear what others of you think about this. To what extent does her opinion represent your ideas?”
- In instances where other members of the congregation have been quoted: “I would be interested to know whether others on the committee have also heard this report and from how many persons. Do the persons you have heard from represent a particular group within the church; for example, young adults, the choir, the trustees, etc.?”

These questions are from Richard Yeager, ed., *Developing and Evaluating an Effective Ministry: A Manual for Pastors and Diaconal Ministers* (Nashville: General Board of Higher Education and Ministry, n.d.), 25. Used by permission.

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A Common Understanding for Our Ministry Together

We, the pastor and Staff-Parish Relations Committee members of _____
United Methodist Church affirm the ministry we share in the following ways:

- Together we lift up these essential qualities and areas of competencies of

_____ as our pastor:

- Together we agree on the following goals to enhance our pastor's personal qualities and characteristics for ministry, along with a means of measuring whether these goals have been met:

- The SPRC will support our pastor in meeting these goals in the following ways:

- Together we agree on the following goals to strengthen our pastor's skills and competencies as our clergy leader for the coming year, along with a means of measuring whether these goals have been met:

- The SPRC will support our pastor in meeting these goals in the following ways:

We covenant to pray for one another and for our church, to be open and honest in our communication, and to commit ourselves to the ministry to which Christ has called each of us.

Additional comments:

Date: _____

Pastor's signature: _____

Staff-Parish Relations Committee Members' signatures:

Please return this *Self-Assessment for Vital Ministry* and the *Common Understanding for Our Ministry Together* to the district superintendent at your charge conference or to the district office no later than December 15, 2008.