

Guidelines for Church Professional Evaluations **Presbytery of New Covenant Committee on Ministry**

Among its many responsibilities, the Session of each local congregation is tasked to provide for an annual review the terms of call of its pastors (G-2.0804). Presbytery's Minimum Terms of Call require a performance review on an annual basis. This task may be completed by the Session acting as a committee of the whole; or, the responsibility may be charged to a personnel committee or Ministry Team that will report its work to the Session. The Committee offers the following guidance on these matters.

One response put the evaluation process for the pastor/s in perspective with these words,

“Good evaluations start with good job descriptions and goals. Pastors start out with job descriptions when they are hired, but these need to be updated each year, as necessary, in the evaluation process. There also need to be goals established to guide the pastor so that the most important things can get the highest priority of his/her time and effort, and these change over time and need to be updated in the evaluation process also.

The evaluation process needs to be non-adversarial. We are out to help the pastor(s) succeed, not to blame him/her for the problems in the church. It needs to be an open forum where all issues can be put on the table.

The pastor(s) should feel free to ask for a needed salary raise without being accused of being greedy, and there might be a goal of increasing stewardship in the church to pay for it instead of just saying we can't afford it. (Part of this might be the pastor's goal of preaching more stewardship sermons.) If the congregation is complaining of the pastor not visiting them enough, then there needs to be a goal of getting Session members to help with the visitation or doing some other task that the pastor is doing that doesn't give him/her time to visit.”

Adequacy of Compensation

Each year the session of the church is required to review the adequacy of compensation for the pastor. This review is to take into consideration the realistic cost of living for any given community.

The Purpose of Evaluation

The purpose of a performance evaluation is not to survey the congregation for its opinions and feelings. No church is unanimous in its support for or dislike of any staff member or pastor. In every church there is a diversity of opinion which reflects the diversity of expectations of each member of the congregation. The purposes of a performance evaluation (for a staff member or pastor) are:

1. to establish dialogue between the employee, supervisor and a committee;
2. to serve the work-related need for feedback for both the supervisor and employees;
3. to demonstrate accountability of supervisor to employee and vice versa;
4. to build trust and teamwork;

5. to properly recognize contributions of each member of the church staff;
6. to provide a written record of work;
7. to provide an opportunity to learn goals/ambitions/issues/expectations that were not previously articulated.

The review discussion may involve clarifying expectations, review of work progress and constructive feedback. Within the context of a personnel review, all feedback should be

1. descriptive (describe the behavior and not the person, and remain nonjudgmental in time)
2. specific (focused on a specific action or event that is identifiable and not based on hearsay, and avoids a generalization or meaningless expressions)
3. directed toward behavior the employee can change,
4. encouraging rather than imposed, and
5. confirmed by feedback techniques that the message was understood.

To be successful, the employee must understand:

1. how she/he is doing in her/his work;
2. what needs to be changed, improved and maintained;
3. opportunities that exist to help improvement;
4. what will be used to measure and evaluate future work performance.

Use of Evaluation Tools

If you choose to use forms as part of your review, they should:

1. be given to a limited number of persons; limiting circulation to those who work closely with the pastor or employee. It is rarely beneficial to survey the entire congregation in personnel matters.
2. be signed by the person filling them out. The forms can be collated and summarized and presented to the person being reviewed, but it is important that those giving the feedback be identified, so that follow-up can be done. Anonymous feedback should not be considered or shared.
3. be shared in person with the chosen review team.

Use of Objective Tools

Any evaluation should include the use of tools that evaluate objective measurable information; (the number of new members received within the past year, changes in worship attendance or membership, the number of baptisms, confirmations).

Congregations have used a variety of forms to evaluate the performance of pastor and personnel. Some of these documents are used for the pastor or employee for the purpose of self evaluation, while others are prepared for a review that is performed by others.

Some churches formulate no more than four "SMART" objectives. These objectives may be defined as Specific, Measurable, Attainable, Realistic and Timely (or, as another defined Stretch, Measurable, Achievable, Results-oriented, and Timely). We include some sample questions gleaned for the responses we received.

Staff Review

(To be completed by staff person)

1. Based on my present position description, I have the following staff responsibilities and duties:
2. The following is my assessment of my strengths and weaknesses in relation to my staff responsibilities and duties:
3. I would offer the following suggestions for the improvement of staff functions:
4. What questions do you have about what's expected of you on the job? Are there areas that are unclear?
5. What is currently satisfying about your work?
6. What do you consider to be your most important accomplishment(s) in the past 12 months? What positive contributions did you bring to this position during the past year?
7. What new responsibilities did you take on during the past year? Please discuss what you learned from the experience. Will you continue to take on these responsibilities? If not, discuss how you think these responsibilities should be handled.
8. What is currently frustrating about your work? What elements of your overall work assignment would you change, if you could?
9. What are you excited/passionate about regarding your work for the coming year?
10. In what areas do you need or want to make improvements over the next year?
11. What do you want to accomplish/eliminate/improve, in order to maximize your potential? What steps can you take to address these needs?
12. Is there any training you think you need to be more effective?
13. What are your major goals for the coming year?
14. How can we (staff supervisors/personnel committee) help you get this done? What can your supervisor or other members of the staff do to help you improve?
15. What barriers do you regularly encounter that prevent you from doing your best work? What suggestions do you have for minimizing or removing those barriers?
16. What changes in salary/compensation would you make, if that were delegated to you?
17. What ideas do you have to improve office conditions, relationships or operations?

18. Thinking of the past year, what significant accomplishments come to mind related to church office staff and Ministry?

19. Please note any additional items you believe should be addressed during your review.

20. Discuss or comment on any aspect of your job that you would like the committee to be aware of, or problems that you would like help with.

(To be completed by supervisor)

1. What is this church doing in his/her work area that is helped this church flourish?

2. What else could she/he do in her/his work to be more helpful?

3. What would you like to see this person spend more time on?

4. What would you like to see this person spend less time on?

Use of Subjective Tools

Sessions will also necessarily deal with the subjective information when measuring the performance of their pastor(s). Some of the subjective expectations of the pastor can be measured by using the "Leadership Competencies" prepared by the Church Leadership Connection that is used with the preparation of Ministry information Forms (MIFs) and Personal Information Forms. (PIF) This skills list can be found through the website of the Presbyterian Church (USA). The tool can be adapted to each job description by taking out questions that are not applicable, and competencies may be evaluated using the following scale:

- 1. doesn't meet expectations**
- 2. meets minimum expectations**
- 3. meets expectations**
- 4. exceeds expectations**

THEOLOGICAL/SPIRITUAL INTERPRETER	
Compassionate – having the ability to suffer with others; being motivated by others pain and is called into action as advocate; is motivated by caring for others while concurrently keeping the organizational goals clearly in focus.	Hopeful – maintains stability in the moment and hope for the future; provides direction, guidance, and faith when describing basic needs; and helps followers to see a way through chaos and complexity.
Preaching and Worship Leadership: Is a consistently effective preacher and worship leader; is able to inspire from the pulpit; communicates a clear and consistent message through sermons that are carefully prepared and artfully delivered; projects the identity and character of the congregation through worship leadership presence.	Spiritual Maturity: Shows strong personal depth and spiritual grounding; demonstrates integrity by walking the talk and by responding with faithfulness of purpose; is seen by others as trustworthy and authentic; nurtures a rich spiritual life; seeks the wisdom and guidance of appropriate mentors; is able to articulate a clear and consistent theology.
Lifelong Learner – individuals who use every experience in life as a potential tool for growth; one who pursues continuing education; and those who build on strengths and seek assistance to improve weaknesses.	Teacher – creates learning environments where students are active participants as individuals and as members of collaborative groups; designs lesson plans that teach concepts, facts, and theology; effectively uses multiple learning tools to reach a wide variety of learners; revises instructional strategies based upon ministry/organization context.
COMMUNICATION	
Communicator - Advances the abilities of individuals and the organizations through active listening supported with meaningful oral and written presentation of information.	Bilingual – having the ability to use two languages, especially with equal or nearly equal fluency; able to use multiple languages in communication.
Public Communicator - Demonstrates a comfortable ease when speaking in a variety of settings (both small and large groups); is effective at addressing a variety of topics; can get messages across with the desired effect.	Media Communicator: Has experience developing materials for a variety of written or multimedia forms of communications (print, Internet-based, social media, etc.).
Technologically Savvy - the ability to navigate successfully the world of technology using software, blogging, multi-media, and websites as tools for ministry.	
ORGANIZATIONAL LEADERSHIP	
Advisor – an individual others turn to for counsel and guidance; provides coaching; expertise for congregations or other organizations.	Change Agent – having the ability to lead the change process successfully; anchoring the change in the congregations'/organizations' vision and mission.
Contextualization – the ability to assess accurately the context, environment, history, relationships and uniqueness of a congregation or organization.	Culturally Proficient – having solid understanding of the norms, values and common behaviors of various peoples, including direct experience working in multiple cultural and cross-cultural settings.
Externally Aware - identifies and keeps informed of the polity of the church and/or the organization; maintains current with laws, regulations, policies,	Entrepreneurial - leaders that are creative in using resources; identifies opportunities to develop; is willing to take risks, initiates actions that involve a deliberate risk to achieve a recognized benefit

	procedures, trends, and developments both internally and in the larger society.		or advantage.
	Risk Taker – persons with the ability to take appropriate risk to accomplish needed goals; one who thinks outside the box and who is not afraid of challenging the status-quo.		Task Manager - Assures that effective controls are developed and maintained to ensure the integrity of the organization; holds self and others accountable for rules and responsibilities; can be relied upon to ensure that projects within areas of specific responsibility are completed in a timely manner and within budget; and monitors and evaluates plans, focuses on results and measuring attainment of outcomes.
	Willingness to Engage Conflict: Steps up to conflicts, seeing them as opportunities; reads situations quickly; good at focused listening; can identify common ground and elicit cooperation from others in crafting mutual solutions.		Decision Making: Makes effective decisions, balancing analysis, wisdom, experience, and judgment; is aware of the long term implications of choices made; is generally regarded as offering solutions and suggestions that are correct and effective.
	Organizational Agility: Is astute about how congregations and/or organizations work; knows how to get things done through formal and informal channels; understands the importance of supporting good policy, practice, and procedure; appreciates the power in the culture of a congregation; is politically savvy.		Strategy and Vision: Sees ahead clearly, keeping focused on the larger picture; can anticipate future consequences and trends accurately; is future oriented; casts a compelling and inspired vision for a preferred future; sees possibility; crafts breakthrough strategies.
	Financial Manager – deliver results by maximizing organizational effectiveness and sustainability through the best use of available financial resources; allocates and manages finances transparently; implements strategies to achieve operational efficiencies and value for money; puts in place rigorous and comprehensive financial accountability systems.		Funds Developer – maintains the ability to solicit donations used to fund the budget of the organization; effectively expresses the needs for funds to potential donors; responsible for adding new potential donors to the organization's contact list; prepares statement of planned activities and enlists support for mission initiatives.
	Collaboration: Has a natural orientation toward getting people to work together; shares wins and successes; fosters open dialogue; lets people finish and be responsible for their work; creates strong feelings of belonging among group members; is a good judge of talent and can accurately assess the strengths and limitations of others.		
INTERPERSONAL ENGAGEMENT			
	Interpersonal Engagement - Displays a consistent ability to build solid relationships of trust and respect inside and outside of the organization; engage people, organizations, and partners in developing goals, executing plans, and delivering results; use negotiation skills and adaptability to encourage recognition of joint concerns, collaboration, and to influence the success of outcomes.		Bridge Builder – possessing a certain responsibility for the unity of the congregation and/or organization; works to connect people of different cultures, worldviews, and theological positions.
	Motivator - Creates and sustains an organizational culture which permits others to provide the quality of service essential to high performance. Enables others to acquire the tools and support they need to perform well; and influences others toward a spirit of service and meaningful contributions to mission accomplishment.		Personal Resilience: Learns from adversity and failure; picks up on the need to change personal, interpersonal, and leadership behaviors; deals well with ambiguity; copes effectively with change; can decide and act without having the total picture; comfortably handles risk and uncertainty; seeks feedback; expresses personal regret when appropriate.
	Initiative: Demonstrates ambition; is highly motivated; is action oriented and full of energy for		Flexibility - Adapts behavior and work methods in response to new information, changing conditions, unexpected obstacles, or

	things seen as challenging; seizes opportunity; pushes self and others to achieve desired results.		ambiguity; remains open to new ideas and approaches; and works concurrently on related and conflicting priorities without losing focus or attention.
	Self Differentiation: Demonstrates strong and appropriate personal boundaries in relationships; has a healthy appreciation of self, without being egotistical; is emotionally mature; can maintain a less- anxious presence in the midst of turmoil; is not overly dependent upon outside affirmation; works to build a strong personal support system.		

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