

PASTORAL EVALUATION INSTRUMENT

Name: _____

For each staff member, one of these forms should be completed by the staff member and one by the Senior Pastor and/or the Board of Elders. A conference should then be held with the staff member to discuss the results and make plans for improvement over the next evaluation period.

Please rate the following areas on a scale 1 to 5

1=Poor; 2= Needs Improvement; 3=Average; 4=Good; 5=Outstanding

1. INITIATIVE IN WORK:

- ___ 1.1 Anticipates needs in area of responsibility, establishes appropriate goals and priorities, and implements effective courses of action for plans to be completed on time.
- ___ 1.2 Is able to make essential and required decisions appropriate to the area of ministry and can institute a plan of action a the need arises.
- ___ 1.3 Effectively adapts to unexpected situations.
- ___ 1.4 Volunteers for ministry in situations that require extra assistance or leadership.
- ___ 1.5 Gathers information, prepares reports, and maintains proper files for church business.
- ___ 1.6 Maintains a set schedule of activities to assure that a full work load is carried efficiently and effectively in accordance with the church's priorities.
- ___ 1.7 Seeks spiritual renewal on a consistent basis.
- ___ 1.8 Demonstrates creativity in assessing the needs of the people in the area of responsibility and in tailoring a program to fit the needs of those people.

2. SELF IMPROVEMENT

- ___ 2.1 Follows through in a positive direction on suggestions made by superiors or co-workers.
- ___ 2.2 Is willing to seek and use competent assistance.
- ___ 2.3 Maintains current self-education in ministry through such activities as the study of publications, attendance at seminars, taking additional course work, or participating in other professional pastoral growth activities.
- ___ 2.4 Exhibits a willingness to learn and apply new knowledge and new techniques in area of responsibility.
- ___ 2.5 Recognizes that a personal contribution is important for the success of the total church program.

- ___ 2.6 Exhibits scholarship, literacy, and intellect appropriate to an effective ministry.
- ___ 2.7 Maintains a regular devotional life for spiritual improvement.
- ___ 2.8 Continues to improve communication skills.

3. LANGUAGE USAGE:

- ___ 3.1 Correctly uses oral and written language.
- ___ 3.2 Uses appropriate vocabulary in ministering to the people.
- ___ 3.3 Speaks well in front of large and small groups, expressing ideas in a logical and forthright manner.
- ___ 3.4 Has a well-modulated voice with distinct and accurate pronunciation.

4. COOPERATION AND PERSONALITY:

- ___ 4.1 Is recognized as a dependable co-worker and an enthusiastic minister.
- ___ 4.2 Is harmonious and cooperative in the performance of duties.
- ___ 4.3 Understands the need for security in confidential matters and acts appropriately.
- ___ 4.4 Exhibits a willingness to consult with the Senior Pastor, and only the Senior Pastor, if a grievance problem arises.
- ___ 4.5 Follows Matthew 18:15-17 in dealing with differences with co-workers and other Christians.
- ___ 4.6 Takes responsibility for the assigned area of work.
- ___ 4.7 Maintains a temperament of openness and tolerance in working conditions.
- ___ 4.8 Is able to put aside differences and personal problems in order to be congenial with co-workers and other people.
- ___ 4.9 Exercises self-control in difficult situations.
- ___ 4.10 Speaks politely in a courteous tone and manner.
- ___ 4.11 Exhibits an appropriate sense of humor.
- ___ 4.12 Has been following and is presently implementing the scriptural teaching I Timothy 3; Ephesians 6 on the ministry of the home.
- ___ 4.13 Demonstrates loyalty, teamwork, compatibility, proper conduct, spiritual life and attitude, and adjustment to the people, their culture and life.
- ___ 4.14 Refrains from belittling colleagues, undermining authority, gossiping, and participating in any other sins of the tongue and attitude.

5. HEALTH AND PERSONAL HYGIENE:

- ___ 5.1 Exercises good taste and moderation in dress, personal grooming, and hygiene in accordance with accepted standards.
- ___ 5.2 Has a minimum of interruptions of the work responsibilities due to health and home problems.
- ___ 5.3 Has a cheerful mental outlook as exhibited by pleasant relations with co-workers and others.
- ___ 5.4 Takes proper steps to protect and maintain good health.

In each of the following areas please circle the letter that best describes the individual:

6. PROFESSIONAL RESPONSIBILITY:

- A. Reports at meetings or in literature on innovative practices he/she has developed or tested.
- B. Evidences no interest in innovative practices.
- C. Develops and tests out innovative practices, but does not formally report them.
- D. Demonstrates unfamiliarity with sources of information on innovative practices.
- E. Participates in meetings where innovative practices are discussed.

7. SELF-EVALUATION:

- A. Utilizes occasional informal self-evaluation.
- B. Makes little use of self-evaluation.
- C. Assumes no responsibility for self-evaluation.
- D. Utilizes a planned program for self-evaluation.
- E. Utilizes self-evaluation on a systematic basis in selected areas.

8. PASTOR/PEOPLE RELATIONSHIPS:

- A. Rejects responsibility for pastor/people problems or relations.
- B. Participates in church activities and explains innovative programs to individual groups.
- C. Attends group meetings rarely; indifferent to pastor/people problems.
- D. Contributes to the definition and solution of church problems relating to the pastoral work.
- E. Attends church meetings occasionally and serves informally as a resource person regarding the pastoral responsibilities in the church.

9. PASTOR/PASTOR RELATIONSHIPS:

- A. Is reluctant to become involved with co-workers.
- B. Cooperates with co-workers at all times and assumes some leadership among them.
- C. Has rapport with co-workers and cooperates with them when called upon.
- D. Demonstrates a cooperative attitude and exerts leadership among co-workers in church programs.
- E. Cooperates with co-workers when convenient.

10. ASSISTANT PASTOR/SENIOR PASTOR ADMINISTRATION RELATIONSHIPS:

- A. Assumes responsibility for formulating church programs and carries out the policy of the Church Administration.
- B. Assumes responsibility reluctantly for formulating church programs.
- C. Assumes some responsibility for formulating church programs and carries out the policy of the church administration as directed by the Senior Pastor.
- D. Takes initiative in formulating with the Senior Pastor church programs and ably carries out church programs.
- E. Carries out assigned responsibilities at direction of the senior pastor; promptly submits reports, etc.

11. SPIRITUAL CONSIDERATIONS:

- A. Generally exemplifies acceptable Christian behavior.
- B. Exemplifies model Christian behavior consistent with the accepted standards of the Christian and Missionary Alliance.
- C. Exhibits acceptable Christian behavior most of the time but needs occasional remediation.
- D. Demonstrates acceptable Christian behavior some of the time but needs much remediation.
- E. Shows actions that are unacceptable most of the time.

Please feel free to elaborate more completely on any area of this evaluation. This should be done cooperatively by the Pastor and the Board of Elders.

Date of this evaluation: _____ Date interview held: _____

Signature of Pastor

Signature of Chairman of Board

PASTORAL EVALUATION PURPOSE STATEMENT

To: Board of Elders

Please be honest in your appreciation and support of your pastor or pastors before you engage in pastoral evaluation. The evaluation process should be a growing experience for both Board and Pastor. In my own pastoral experience, evaluation time was an enriching, encouraging, and uplifting time, and something I eagerly awaited. I was never considered as an employee of the church, always a shepherd.

1. Never ignore a Pastor's performance until the appraisal, and then vent all your dissatisfaction at the appraisal session. This will cause unnecessary frustration and hurt, and the pastor will see this as unfair since no constructive feedback had been given throughout the year. Because of the lack of feedback, pastors rightly assume that their performance has been, and is satisfactory. There needs to be an ongoing personal appraisal of "What are my motives in the evaluation of the pastor?"
2. Performance appraisals must be totally accurate and honest. If there are areas of weakness, these must be addressed by the Pastor and Board of Elders or appointed appraisal committee. There is legal danger in giving either a totally bad review or a totally excellent review unless this can be documented.
3. The performance appraisal is the formal setting in which to discuss a person's work, but it must be followed up with positive discussion of performance throughout the year, particularly when areas of weakness have been pointed out to the Pastor. The Board of Elders or appointed appraisal committee with the Pastor must develop and maintain a "team ministry approach," never us vs. you. The expectations of the Pastor must be commensurate with his natural gifting.
4. Never give the Pastor the feeling that this is an unimportant or unnecessary process by putting off or rushing the review session or by not completing the forms on time. The appraisal experience must strengthen the "team relationship" model.
5. The appraisal setting is not for one-way communication. This is a give-and-take session where both Board of Elders, etc. and Pastor are having the opportunity for discussion and goal setting for their ministries in total church ministry (remember, the Pastor is the chief shepherd.).
6. Nothing may be written on the appraisal form, or even stated during the interview, that cannot be documented or is not really what you meant to say. This form goes in the Pastor and Board files and may come back to haunt the organization if incorrectly completed.
7. Never repeat second-hand information or rumors about your Pastor in an appraisal setting. If you need to follow up on a report against your Pastor, ask about it, but do not give the impression that you immediately assume the report or rumor is correct.
8. Care should be taken when indicating areas of weakness that these weaknesses are not, in fact, caused by insufficient job training. Unsatisfactory performance that falls into this category should be mentioned, but in the light of the fact that it will be corrected through training. This discussion must include a time line for accomplishing the training. Please be reminded, no pastor has all the gifts and the church boards do not have all the gifts as well.
9. Be sure to follow up on pastor frustrations and weakness to encourage and meet goals agreed to, in the appraisal session.
10. Be sure to affirm your pastor during and after the appraisal session.
11. Never discuss potential salary increases or promotion opportunities during the appraisal session.

Procedure for Conducting Appraisals

1. Appraisal forms will be distributed to you approximately one month prior to the date of the review session.
2. The completed forms should be given to the Chairman, Vice Chairman or appraisal designee to be held till the time of the appraisal. It must be understood that the appraisal form is confidential. If a compilation of the appraisal is done before the appraisal session all parties need to agree to the process. After the appraisal is completed all appraisal forms need to be destroyed. The only appraisal form to be filed is the one signed by the pastor and Board of Elders or appointed appraisal committee.
3. Prior to the appraisal session be sure that the comments you plan to make can be documented. This is particularly necessary as these relate to areas of weakness. If areas cannot be documented, they should not be discussed at the appraisal.
4. Allow a minimum of forty-five (45) minutes to conduct each performance appraisal. Forward your phone to avoid interruptions.
5. Both Board of Elders and Pastor must sign the appraisal form. If there is a disagreement over the marking of the review, it should be discussed and, if possible, settled immediately.

(Please turn the page OVER)

6. Provide ample time for the Pastor to discuss the strengths and weaknesses of the Board of Elders and the Governing Board or other appointed or elected committee of the church. Appraisals are always a two-way verbal discussion that leads to effective development.

Follow Up of the Appraisal Meeting

1. Immediate follow up needs to take place when there is either verbal or written disagreement.
2. Year-round follow up with much encouragement needs to be done to strengthen weaknesses (informal meetings and discussions is a good suggestion to strengthen relationships and encourage growth in weaknesses. Remember, “team” concept!
3. Equal in importance to job performance, and, indeed, foundations to job performance, is the matter of a pastor’s personal spiritual growth. This is very personal and is outside the normal acceptable line of questioning. However, since we are a church denomination and spiritual growth is foundational to all we do, it is acceptable to discuss this only if deep rapport is established between the board and the Pastor.

Following are guidelines for handling this section of an appraisal discussion:

- ◆ Be sure there is a distinct break between the performance-related appraisal and any discussion relating to spiritual issues. Put the performance appraisal form away and indicate to the Pastor that your next questions are not performance related, but are being asked because of your concern for him as an individual.
- ◆ Reassure the person that this is confidential and “off the record.” If you have a serious concern because of what you hear, you will need to secure the person’s permission to discuss this with the Board.
- ◆ Start the conversation in a way that’s comfortable for you. A suggestion, if applicable, would be, “We haven’t talked for awhile. How are you doing personally? Focus on the fact that our walk with the Lord is foundational to our ministry here at the church. You may want to ask questions relating to personal devotions – what tools do they use in their devotions?”
- ◆ Be sure to follow up with the person if they indicate any difficulty.
- ◆ Pastor may not feel very comfortable with this type of questioning. If you don’t get much of a response, don’t press the issue at this time.
- ◆ Cultivate an atmosphere of concern for your Pastor in a casual way throughout the year.

Six Keys to Motivate Good and Healthy Appraisals

When a Board of Elders say, “I wish I could motivate John,” that usually means “I wish I could get John to do his job better.” Here are six keys to doing exactly that.

1. **Ask for performance.** Describe how the job is being done now, and how you want it to be. Then ask the Pastor to consider doing it that way (remember “gifting” concept).
2. **Use lots of positive reinforcement – and personalize it.** Don’t take acceptable work for granted. Thank people for it. And praise them every time they improve. Remember, though, that while everyone likes to be recognized, what motivates one may leave another cold – or even irritated. So find out what works with each of your people, and use it (remember, your Pastor is a shepherd, not an employee).
3. **Build relationships.** This doesn’t mean be buddy-buddy with your Pastor. But it does mean you should treat your Pastor like a real, live human being. That’s what they are, and they will respond best when your actions show you respect their individuality and trust their intentions.
4. **Understand your Pastor’s point of view.** Make a habit of listening to him and asking his opinion before you give directions or offer advice. If you listen first, and listen with an open mind, Pastors are much more likely to cooperate when you decide something has to be done differently.
5. **Model what you want.** Approach your own work with a sense of urgency, use your time efficiently, and meet the goals you set. Show pastors by your actions that the job really does matter, that quality is important, and that deadlines are real.
6. **Refuse to accept poor performance.** Though textbooks on motivation seldom admit it, Board of Elders do have to tell pastors when their performance is not acceptable, with love and respect for him. Sometimes this means a plan for improvement. At other times you can handle it through coaching. But either way you’re demonstrating that standards matter – and that, in itself, is motivational. As the old saying has it, “it’s better to aim for ‘Excellence’ and hit ‘Good’ than to aim for ‘Good’ and hit ‘Average.’”

Conclusion

Much of the information sent to you is from three sources:

- a. National Office
- b. Other districts
- c. My own church background experience