

## **SAMPLE PERFORMANCE MANAGEMENT REVIEW AND EVALUATION OF A PASTOR**

Performance appraisals conducted on an annual basis for Pastors have not been proven to be a reliable instrument. Performance issues and untoward behaviour can become an entrenched pattern over a period of year, creating significant problems before the behavior or performance is able to be addressed.

Performance management reviews are a better alternative to appraisals. They create an environment in which Pastors are able to utilize their gifts and abilities with positive reinforcement and constructive input. Performance management reviews consider the whole of the Pastor's workload.

An effective performance management review helps Pastors succeed at fulfilling the church's mission. It provides enough guidance for Pastors to realistically understand what is expected of them. It allows enough flexibility so that the Pastor can use their own creativity and strengths. It provides Pastors sufficient boundaries for accountability.

The performance management review assumes that the following actions have been or are being implemented before any performance management review is conducted:

1. Church leadership has developed a clear job description that helps the Pastor to understand the expectations for the position and the outcomes expected. A pastor cannot function unless they clearly know the church's expectations of them.
2. Church leadership will provide ongoing coaching and feedback which will include the conducting of quarterly performance and development discussions.
3. Church leadership has designed an effective compensation and recognition system that values and respects the Pastor for their work. It is often not so much the issue of money as it is about the message any reward or recognition sends to the Pastor about their value. In ministry, the value of encouragement along with monetary compensation cannot be overstated.

### **CONSIDERATIONS FOR CHURCH LEADERSHIP BEFORE CONDUCTING THE REVIEW**

It is hard to be straight forward in focusing on a Pastor's liabilities when they have a vulnerable role and may find it hard to hear corrective advice. Often a church's leadership is not fully aware of what the Pastor does, which makes it difficult to do an effective evaluation. Very often a Pastor feels reticent to admit their weaknesses for fear of jeopardizing their ministry. In addition, the Church's leadership may not have developed an atmosphere of nourishment and protection for and of the Pastor which results in them not feeling safe.

For pastors, their ministry is their life. To challenge or correct their ministry role as a Pastor is to cut at the heart of the Pastor's life and vocation. Love must pervade the process. (1 Corinthians 13) The role of Pastor can be a lonely one. It would be extremely helpful if the church's

leadership were to establish an atmosphere of prayer and encouragement with the pastor before conducting a review.

The Church's leadership should be certain to establish in advance the nature of the review process so that the Pastor will not be taken by surprise. Both the Church's leadership and the Pastor should consider every review as an opportunity for the personal growth of both the Pastor and the Church's leadership. Both should submit to one another in love. (Ephesians 5:21) The Pastor should be careful to not perceive the review as a criticism and the Church's leadership should be careful not to conduct it as such.

#### SCOPE OF FEEDBACK:

Following the evaluative model below, the church's leadership will have the opportunity to give careful and prudent reflection on the ministry and life of the Pastor. After completion of the performance review by all members of the church's leadership, a specific time will be set apart to discuss the overall results of the evaluation and/or any recommendations in the presence of the church's leadership and Pastor.

A Church leadership's feedback must give and set expectations or goals that are measurable, achievable, relevant, and controllable. Unless the standards can meet these criteria, they will be vague and unenforceable measurements.

#### PERFORMANCE EVALUATION

Be careful to answer all questions to the best of your ability. Please assign a letter grade to all statements in each section.

A=Excellent  
B=Good  
C=Acceptable  
D=Poor  
U=Unknown

The Church's leadership must include additional observations and comments beyond just the assigning of a grade level.

Name of Pastor being evaluated \_\_\_\_\_

Evaluated by \_\_\_\_\_ Date \_\_\_\_\_

#### SPIRITUAL QUALITIES:

- \_\_\_\_1. Exhibits personal commitment to Christ.
- \_\_\_\_2. Demonstrates submission to the authority of Scripture.

- \_\_\_\_3. Shows a consistent Christian lifestyle.
- \_\_\_\_4. Gives earnest testimony to personal faith.
- \_\_\_\_5. Provides a role model for other Christian leaders.
- \_\_\_\_6. Fulfills the general expectations for spiritual leadership.

In this area our Pastor excels at

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In this area our Pastor should focus more on

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#### ADMINISTRATIVE QUALITIES:

- \_\_\_\_1. Does job conscientiously and seriously.
- \_\_\_\_2. Possesses necessary skills and knowledge for the work.
- \_\_\_\_3. Is aware of policies, bylaws and respect them.
- \_\_\_\_4. Attends to business affairs efficiently.
- \_\_\_\_5. Delegates well and supervises those to whom delegated.
- \_\_\_\_6. Keeps those with whom he works with well-informed.
- \_\_\_\_7. Can be depended upon for accuracy in information?
- \_\_\_\_8. Can be depended upon to be discreet but sensitive matters?
- \_\_\_\_9. Knows how to set goals and how to achieve them.
- \_\_\_\_10. Capable of making decisions and following through.
- \_\_\_\_11. Is an initiator of constructive actions?
- \_\_\_\_12. Evidences skills of cooperation with those who differ with him.
- \_\_\_\_13. Is receptive to new ideas, methods, and concepts?
- \_\_\_\_14. Prepares well for topics to be discussed in meetings.
- \_\_\_\_15. Is a self-starter and accepts assignments without complaints?

\_\_\_\_16. Time management: punctual in assignments and meets schedules.

\_\_\_\_16. Other: \_\_\_\_\_

In this area our Pastor excels at

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In this area our Pastor should focus more on

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#### EMOTIONAL QUALITIES:

\_\_\_\_1. Exhibits mature judgment in decisions.

\_\_\_\_2. Shows positive attitudes.

\_\_\_\_3. Accepts constructive criticism without offense.

\_\_\_\_4. Is considered fair and impartial in his dealings?

\_\_\_\_5. Confronts problems with emotional control.

\_\_\_\_6. Accepts personal affirmation graciously.

\_\_\_\_7. Gives affirmation to others with ease.

\_\_\_\_8. Other: \_\_\_\_\_

In this area our Pastor excels at

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In this area our Pastor should focus more on

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#### PERSONAL AND FAMILY QUALITIES:

\_\_\_\_1. Exhibits personal family and marriage strengths.

\_\_\_\_2. Has good personal health habits?

- \_\_\_\_3. Has courage and integrity?
- \_\_\_\_4. Maintains neatness and cleanliness of his person. Is well groomed and dresses in an acceptable and professional manner?
- \_\_\_\_5. Other: \_\_\_\_\_

In this area our Pastor excels at

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In this area our Pastor should focus more on

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#### PASTORAL QUALITIES:

- \_\_\_\_1. Assists members and adherents through encouragement and wise counsel.
- \_\_\_\_2. Develops teamwork between the church's leadership and various departments.
- \_\_\_\_3. Is sensitive to the feelings and problems of others and is able to provide a supportive climate and establish rapport and credibility with hostile individuals or those holding divergent or antagonistic points of view?
- \_\_\_\_4. Elicits respect from others and staff.
- \_\_\_\_5. A good listener. Establishes communication which invites credibility. Is able to receive, interpret, understand and respond appropriately to those with problems.
- \_\_\_\_6. Does the pastor motivate others through their preaching and teaching?
- \_\_\_\_7. Other \_\_\_\_\_

In this area our Pastor excels at

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In this area our Pastor should focus more on

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### LEADERSHIP QUALITIES:

- \_\_\_\_1. Possesses a clear vision and passion for the present and future ministry of the Church.
- \_\_\_\_2. Keeps vision and enthusiasm alive.
- \_\_\_\_3. Leads without being dogmatic/rigid; a model for others.
- \_\_\_\_4. Maintains control in emotional, volatile or chaotic situations
- \_\_\_\_5. Sets high standards for self and others
- \_\_\_\_6. Spends time training and developing
- \_\_\_\_7. Demonstrates ability to delegate tasks appropriately and motivates others
- \_\_\_\_8. Other\_\_\_\_\_

In this area our Pastor excels at

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In this area our Pastor should focus more on

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### PROFESSIONAL DEVELOPMENT:

- \_\_\_\_1. Continues growth in ministry skills.
- \_\_\_\_2. Is involved in continuing education courses, seminars or workshops.
- \_\_\_\_3. Attends professional meetings and conferences
- \_\_\_\_4. Is relevant and aware of current events and news?
- \_\_\_\_5. Other\_\_\_\_\_

In this area our Pastor excels at

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In this area our Pastor should focus more on

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## OVERALL EVALUATION

Check the box that best describes the Pastor's leadership and competence considering all of the above categories.

\_\_\_\_\_Needs performance/ improvement plan. In this category the Pastor falls below reasonable performance expectations with respect to specific duties and responsibilities. A performance plan must be developed and included when this area is checked.

\_\_\_\_\_Meets expectations. In this category performance is characterized by demonstrated competence in all aspects of the job description including the above items.

\_\_\_\_\_Exceeds expectations. In this category performance is characterized in a demonstration of above average competence in all aspects of his work. At this level the Pastor excels at their work and commitment.

### POST PERFORMANCE REVIEW QUESTIONS FOR THE CHURCH'S LEADERSHIP TO ASK OF THE PASTOR

1. Are you witnessing transformational experiences?
2. Do you feel you are effectively connecting with the congregation?
3. Do you generally feel embraced and loved by the church family?
4. Do you feel that adequate pastoral care is happening in the church?
5. Can you see exciting or challenging developments over this past year in the church?
6. What are you doing for "professional development"?
7. How are you connecting to other ministry people outside of our congregation?
8. Do you get positive responses to your preaching?
9. Do you feel that there is a good balance in your preaching?
10. Would you like a more regular or more formal preaching feedback process?
11. Describe your leadership style? (Autocratic, Passive, Democratic, Collaborative, etc.)
12. Do you think the staff and the church leadership understand and embrace the vision and mission of the church? Are they fulfilled and eager to serve?
13. Are you happy with your relationship with the church leadership? Are there things your leadership could be doing to help you better manage your time?
14. What occupies most of your time?
15. What have been your primary challenges? How can we help?
16. What would you like to see happening in your own life in the next year or two?
17. What would you like to see happening in the church in the next year or two?
18. If there were one thing you could change about ministry here it would be.....
19. Are you generally working within the area of your giftedness?
20. Are there areas of your ministry that you feel are not effective because you are not gifted in that area?

21. Can we help bring people alongside you to help in areas where you feel frustrated?
22. Are there any new family issues?
23. Do you have any financial concerns regarding your compensation?
24. How are you handling your stresses or pressures?
25. Are you managing time off well? Are you taking the holidays you intended?
26. Are there any struggles, personal temptations or dangers that we can help you with?
27. Are there pastoral development courses that you would be interested in taking?

**RECOMMENDATIONS:**

The Church Leadership's expectations and goals where the Pastor's performance is a key factor are listed below:

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The areas where church leadership needs to help the Pastor are recorded below.

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After the interview process has been completed, a written follow-up letter along with a copy or summary of the evaluation including any personal goals should be given to the Pastor detailing any follow-up or action to be taken.



