

# Annual Evaluation

From the 2012 *Book of Discipline, The United Methodist Church*

**¶ 350. Evaluation**—*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.*

*1. The district superintendent, in consultation with the pastor-parish relations committee, will evaluate annually the pastors’ effectiveness for ministry (¶334.2c, 419, 635.2o, r), using criteria, processes, and training developed by the cabinet and the Board of 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 (¶258.2g[5]), using criteria, processes, and training developed by the Board of Ordained Ministry and the cabinet.*

**The Virginia Conference Cabinet and Board of Ordained Ministry have designed the annual evaluation process to be used for all clergy appointed to local churches. The forms will be sent from the district office on March 15 annually. The report form shall be submitted to the district superintendent by June 1 annually.**

## Kinds of Evaluation

- Summative Evaluation – moves toward a conclusion or judgment. “How well is the clergyperson advancing the overall mission of this congregation?” This helps a clergyperson and congregation decide if they have accomplished all that God needs done through this match. The end result is completion of the Appointment Preference Form. This is the **Appointment Review**.
- Formative Evaluation– helps the staff person move ahead. “What changes and enhancements can be made to aid the clergyperson to better lead the overall mission of this church?” The goal is more effective ministry based on identifying strengths and developing a specific action plan for growth. This is the **Annual Evaluation**.

## Steps for an Effective Evaluation

1. Prepare by reviewing the materials ahead of time
2. Complete the measurable characteristics worksheet
3. Clarify boundaries and confidentiality
4. Chair and pastor together write final report

## **Annual Clergy Evaluation by the Pastor/Staff Parish Relations Committee Virginia Conference**

One of the duties of the Pastor/Staff Parish Relations Committee is to “provide evaluation at least annually for the use of the pastor(s) and staff in an on-going effective ministry and for identifying continuing educational needs and plans” (2012 *Book of Discipline* ¶258.2(g)(5)).

### **The Virginia Conference uses two types of annual review of clergy:**

1. A “formative evaluation” is about growing the working relationship between a pastor and a congregation. It helps the pastor refine or develop new ministry skills needed in the current appointment. It typically involves such questions as: “What can this clergyperson do differently to better lead the overall mission of this church?” The goal is more effective ministry based on identifying pastoral strengths and developing a specific action plan for pastoral growth. The Annual Evaluation outlined in this document is ‘formative’. The DS will send a reminder and the forms to churches and pastors on March 15. It is to be completed by S/PPRC and sent to the DS between April 1 and June 1 each year.
  
2. A “summative evaluation” moves toward a decision or judgment. It helps a pastor and congregation decide if they have accomplished all that God needs done through this match. A typical question might be: “Are we at a good place to change leadership or do we have more of God’s work to do together?” The **Appointment Review** conversation by the Pastor/Staff Parish Relations Committee in **November or December** each year is ‘summative’. The results of that conversation are reported on the Pastor Preference Form (for pastors) and the Appointment Request Form (for deacons). The DS will send a reminder and those forms in early November to be returned to the district office by **mid- January**.

### **Resources to use in the annual clergy evaluation:**

- *Characteristics of Effective Clergy* (attached)
- *Responsibilities and Duties of Elders and Licensed Pastors* (2012 *Book of Discipline*, ¶340)
- Job Descriptions for Appointed Deacons and Associate Pastors
- Congregation’s Goals
- Congregation Report from “Equipping Vital Congregations” data collection

### **Annual Clergy Evaluation Process:**

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  - To the Committee: Which three to five of these characteristics do you believe are strengths for this clergyperson?
  - To the Clergyperson: Which three to five of these characteristics do you believe are your strengths as you live out your responsibilities in ministry?
  - To the Clergyperson: Which three to five of these characteristics do you believe are your weaknesses as you live out your responsibilities in ministry? What would strengthen your ministry in these areas?
  - To the Committee: Which three to five of these characteristics do you believe are weaknesses for this clergyperson? What would strengthen this clergyperson’s ministry in these areas?
- Develop an action plan to strengthen the identified areas of weakness.
- Submit *Report Form: Summary of Evaluation and Action Plan* (attached) for each appointed clergyperson, signed by both the clergyperson and the chair of the Pastor/Staff Parish Relations Committee, and the *statistical history of your congregation* from the Vital Congregations web site to the District Superintendent by June 1 annually.

### **Remember to:**

- Begin and end meeting with prayer or centering worship.
- Allow adequate time for honest feedback.
- Remind participants of confidentiality.
- Communicate clearly, use specific examples, and listen carefully.

# Characteristics of Effective Clergy

## Virginia Conference

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These are the leadership qualities and vocational competencies that define the effectiveness of clergy in the Virginia Conference. Additional measurable characteristics of congregational health are included to provide information for discussion of the clergy person's leadership and resulting effectiveness.

### Leadership Qualities

- *Maturing Spirituality*: Exhibits a disciplined spiritual life, maintaining healthy boundaries and being accountable for one's work and actions, including participation in a program of personal spiritual enrichment and renewal.
- *Integrity and Authenticity*: Demonstrates consistent behavior that is in alignment with Christian beliefs, practices, and healthy relationship with God.
- *Sound Theology*: Understands, knows, and celebrates the power of Jesus Christ to bring healing and wholeness, forgiveness and reconciliation, justice and peace, to the lives of individuals, congregations, and communities.
- *Servant Leadership*: Exhibits servant leadership that cultivates the gifts of the Spirit and empowers others to claim their call and find their place in ministry.
- *Relational*: Exhibits the ability to listen, develop working teams, equip persons for ministry, and manage conflict in a way that leads to healthy resolution.
- *Self Care*: Maintains a healthy balance between self, family, and work and participates in the Virginia Self-Care Covenant.
- *Connectional*: Serves as a leader who knows and supports United Methodist theology and polity as defined in the *Book of Discipline*, gives clear support for connectionalism and obedience to his/her ordination vows.
- *Adaptability*: Demonstrates the ability to be flexible regarding geographical location, congregational constituency, and worship styles.
- *Performance Standards*: Exhibits a high level of work ethic and consistently produces quality results.

### Vocational Competencies

- *Evangelism and Discipleship*: Demonstrates the ability to lead the congregation in making disciples of Jesus Christ for the transformation of the world.
- *Ministry Development*: Demonstrates a willingness to lead the congregation in establishing ministries of nurture, outreach, and witness.
- *Proclamation*: Possesses and articulates a working knowledge of biblical faith; demonstrates the ability to communicate and apply the gospel of Jesus Christ in culturally relevant ways to the diverse population groups of our conference.
- *Commitment to Inclusivity*: Models and embraces inclusiveness, demonstrating sensitivity to diversity.

- *Visioning and Implementation Skills:* Demonstrates the ability to partner with laity in identifying and articulating the vision plus the assessment and administrative ability to make the vision become reality.
- *Inspirational and Motivational Skills:* Relates to others in a way that inspires and encourages them in their life of faith.
- *Administration:* Demonstrates administrative, management, and supervisory skills.
- *Pastoral Care:* Devotes time for pastoral care appropriate to the ministry setting, encourages and equips laity for the ministry of pastoral care, establishes and adheres to visitation priorities appropriate to the ministry setting.
- *Conflict Management:* Demonstrates the ability to handle complaints, settle disputes and resolve conflicts.

### **Vital Congregations Characteristics**

- Disciples worship (average worship attendance)
- Disciples make new disciples (number of people who join by profession of faith)
- Disciples engage in growing as a disciple (number of small groups, Sunday school classes and Bible studies)
- Disciples engage in mission (number of people from the congregation engaged in local, national and international mission/outreach activities)
- Disciples give to mission (total amount given by local church to other organizations for support of benevolent and charitable ministries, including apportionments paid and support for all United Methodist and non-United Methodist organizations active in work such as advocacy, education, health, justice, mercy, outreach, and welfare anywhere in the world)

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Adapted from: *Standards for Clergy Leadership in the Virginia Conference* and *Characteristics of Effective Clergy in the North Georgia Conference*

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