

# Pastoral Evaluation in the *United Church of Christ*

## Introduction\*

There is no formal clergy evaluation procedure within the United Church of Christ. However, clergy evaluation is going on all the time within churches. Whenever a pastor is engaged in an activity, the church members are informally evaluating that behavior in light of their own expectations of the minister. There are many different words used to describe this formal activity within the church. Some persons prefer using words such as “performance review” or “planned appraisal” and still others, “evaluation.” We shall use evaluation as the primary word. Evaluation means “to ascertain or fix the value or worth of, or to examine or judge; appraise; estimate.” (American Heritage Dictionary 1976) Both definitions are used as persons seek to appraise or judge another’s behavior in light of their own values. It is helpful to have the person being evaluated and the evaluators discuss their understandings of the values within the ministry of the congregation. The minister also evaluates her or his performance in light of what s/he hopes to achieve. This paper will seek to offer suggestions on how a pastor and congregation together might evaluate the pastor’s ministry within the life of the congregation. It also allows for some mutuality by encouraging the congregation to evaluate itself as well.

## The Purpose of Evaluation

The purpose of clergy evaluation is to assist the clergy in being the most effective pastor possible in the particular church being served. Also, it is to help the pastor in her or his growth and development within ministry. Gaining objectivity or clarity in evaluation of pastoral leadership is an important task. We recognize that most of what a pastor does in the performance of ministry is highly subjective, and immediate results are rarely recognizable. Yet we believe that there are unique opportunities for growth that take place because of an evaluation.

An evaluation is helped if there are common definitions about role and function within ministry. A pastoral **role** referred to in this document means a collective total of things one does as a pastor (e.g. “pastoral care”). A pastoral **function** refers to an individual activity performed by a pastor (e.g. “hospital visits”).

We encourage congregations to undertake a clergy evaluation for growth and development *at a time other than that of salary review*. We are convinced that persons many times will not be candid if they believe direct budget implications are involved. It would be foolish to assume that there is not any carry-over to salary issues; however, the focus of clergy evaluation for growth and development should be clearly for that purpose alone. It is our belief that the results of clergy evaluation will influence the salary question; but, it is hoped, in a more indirect way.

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\* The material in this document through “Step 5” on page 3 comes from the Office for Church Life and Leadership, 1978. Further material has been written and added in by C. Call (Indiana-Kentucky Conference, UCC, 2012).

We also believe that it is **not** helpful to undertake the clergy evaluation procedure at a time of great conflict in the congregation. Clergy evaluation procedures cannot take the place of conflict management. In cases of conflict, we recommend that the pastor and the congregation seek the counsel of their conference office for assistance.

A healthy evaluation clearly states the objectives to be accomplished by a review of the pastor's performance. Do not use the evaluation of the pastor to evaluate the whole program of the church. Carefully determine the functions and responsibilities of the pastor and evaluate the pastor's effectiveness in carrying them out.

### **Procedure for Clergy Evaluation**

An evaluation procedure usually involves the following steps:

1. Decide why you want to evaluate. Are you trying to deal with a problem or increase the effectiveness of your pastor and the church's mission?
2. Decide what you want to evaluate. What areas of the pastor's and congregation's work need to be evaluated?
3. Collect information about the areas of work that need to be evaluated.
4. Study and analyze the information received. What does the information indicate and what interpretation can be given it?
5. Decide what is to be done as a result of the evaluation. What do you expect the pastor to do as a result of the evaluation? What should the congregation do as a result?

#### Step 1: Decide **why** you want to evaluate.

Caution: many persons begin an evaluation process by asking for an instrument that will do the task for them. This is an important step, but it **is not the first!**

There are many different reasons to evaluate a pastor's performance. It is important that both the evaluators and the person being evaluated state in writing why this evaluation is to be done.

#### Step 2: Determine **what** you want to evaluate.

The role of pastor has many widely varied functions and expectations connected with it. The expectations of the members of a congregation are as varied as the number of members. Further, every pastor perceives the role of minister differently. For example, often a member of a congregation will assume that the pastor is doing what that member expects him or her to do. At the same time, however, others in the congregation have quite another view of the pastor's role. One person may expect the pastor to visit every home in the congregation during the year, while another may assume that visiting once every three years is adequate. The pastor inevitably has difficulty perceiving and meeting everyone's expectations.

It is important to state in writing the **agreed upon expectations** of the **roles** and **functions** of the pastor. Be as specific as is possible so that all persons have the same

understanding of the functions and roles being described. Once you have a common understanding of the functions expected, these can be used in the evaluation instrument.

Step 3: Choose the **data collecting** technique.

There are many different ways and means for collecting data. The pastoral and congregational rating guides are one form, and an example is included here. (There are others available upon request) The numerical ratings provide a way for the congregation to indicate their feelings about the effectiveness or adequacy of the performance of the pastor. They also have the opportunity to evaluate themselves in their own response to their pastor. An entire congregation, every committee of the church, or a selected sample of the congregation may be surveyed. Data is collated and the evaluation group and the pastor talk through the results. Through a process of negotiation, they begin to establish mutually agreed-upon priorities for the future. Together, the committee and the pastor agree upon the functions of the pastor, the amount of time and energy to be given to each, and the kinds of results to be expected.

Step 4: Determine **how to use** the collected data in the evaluation.

It is important that all persons understand the process and how evaluators were selected. Further, it is important to indicate how the data will be used. The evaluation committee is strengthened if members understand the purpose of evaluation. The committee should have an on-going relationship with the pastor so that trust may be established between the committee and the pastor. There should be persons on the committee who have been selected by the congregation as well as some recommended by the pastor.

Step 5: Formulate the **results** of the evaluation.

The results of the evaluation are **not** the raw data that is received from the evaluation. Rather, it is the processing of that data, discerning the implications, understanding with clarity what has been said, and finally, formulating the goals for improved or changed behavior.

The continuing committee should work with the pastor to implement his or her goals for growth and development in the ministry of the church. The hopes and dreams of the congregation for its ministry should also be understood and agreed upon for the future.

The purpose of a pastor's evaluation is to assist the pastor in doing a better job **growing** and **developing** in her or his ministry. The way the committee and the congregation support that premise will, in large part, affect the final outcome of an evaluation procedure.

**Forms and Questions for Clergy and Congregation**

**Form A:** This form can be used as is, or can be revised by the evaluation committee to reflect the agreed-upon functions that they deem to be most important. Items should be listed in direct terms. Avoid particulars that are not agreed upon by everyone. For example, "Clear and Effective Preaching" is better than "Preaching that emphasizes the importance of the Trinity."

**Form B:** This form allows the congregation to reflect on how they have related to and cared for their pastor. The items listed are suggestions – they can be edited or added to as a committee sees fit. Obviously, different members will have different responses based on their own understandings of ministry and their own expectations of the pastor. However, the answers can serve as way to encourage reflection and conversation.

**Reflection Questions:** There are questions for members of the congregation as well as for the pastor. These are meant to flesh out some of the celebrations *and* challenges faced by the congregation and pastor in the previous year (or time since last evaluation). Allow sufficient time for people to write thoughtful answers. Be sure that the congregational reflection questions are completed by a fair and representative sample from the community.

*Note on use of names:* You may wish individuals members to sign their evaluation sheets or somehow indicate their names (at least to members of the evaluation team). This helps to dissuade the anonymous negative evaluation. There is nothing quite as damaging as anonymous complaints leveled against a pastor. Evaluation team members, if presented with a particularly negative evaluation, can speak with the individuals responsible and discern how best to share the negative feedback with the pastor in helpful and responsible ways.

### **Preparation for Evaluation**

Committee members may wish to include an instruction sheet with the evaluation forms when they are distributed to the members of the congregation (or to the representative sample). Items that could be included in the sheet:

- Who is on the evaluation team
- Why evaluation is taking place at this time
- How the evaluations will be collected and who will collate the data
- How the information will be shared with the pastor
- How the pastor will share his or her own self-evaluation results (or key points) with the congregation
- How do complete the evaluation, when it is due, and who it should be turned over to
- How to approach the task:
  - o Pray for openness and a spirit of discernment
  - o Be honest and provide more than one-word answers
  - o Be respectful (speak the truth in love)
  - o Give it the time it deserves
  - o Answer only for yourself, not for anyone else (don't report hearsay or gossip)
  - o Remember that this is meant as an exercise for mutual learning and growth

## Form A: Pastoral Rating Guide

<b>Function</b>	<b>Very Effective</b>	<b>Effective</b>	<b>Somewhat Effective</b>	<b>Not Effective</b>	<b>Don't know</b>
Leading worship in general					
Preparation for worship					
Preaching					
Home visitation					
Hospital visitation					
Engagement in further study of Bible and theology					
Stimulating others to grow as Christians					
Encouraging engagement in the UCC and DOC					
Conducting weddings and/or funerals					
Sensitivity to member's personal needs					
Responding to critique or conflict					
Building a sense of community					
Work with committees and church officers					
Sharing leadership with others					
Honoring commitments, carrying out promises					
Engagement with other religious leaders in area					
Ability to balance work and personal life					
Demonstrating welcome and acceptance					
Sharing his or her own spiritual journey					

## Form B: Congregational Rating Guide

<b>Responses</b>	<b>Good</b>	<b>Fair</b>	<b>Needs Improvement</b>
Welcoming and accepting our pastor as the unique individual he or she is			
Respecting the privacy of our pastor			
Providing our pastor with time off for vacation			
Supporting time off for continuing education			
Supporting our pastor with generating ideas and new programs			
Praying for our pastor			
Supporting and encouraging our pastor			
Sharing leadership with our pastor			
Sharing our concerns in a timely manner			
Sharing our concerns in a loving manner			
Reaching out to include and support our pastor's family			
Supporting our pastor in times of crisis or with health concerns			



4. How do these items affect you personally?

5. What are some ways you think you and other members of the congregation could strengthen your relationship with your pastor?



4. How did you respond to and cope with these challenges?

5. How positive do you feel about your ability to work through these challenges?  
What worked? What didn't work?

6. Name 1-2 things you feel you could improve upon in the year to come.

7. What do you feel needs to happen in order to improve in these ways?

8. What are some specific ways that your relationship with your congregation could be strengthened?

9. Where do you feel God is leading you in the year to come?

10. What do you need in order to strengthen and deepen your own spiritual life?