

Assessment: How We Do It

Introduction

The mission of the Church is to make disciples of Jesus Christ for the transformation of the world. Local churches provide the most significant arena through which disciple-making occurs.

We make disciples as we

- *--proclaim the gospel, seek, welcome and gather persons into the body of Christ;*
- *--lead persons to commit their lives to God through baptism by water and the spirit and profession of faith in Jesus Christ;*
- *--nurture persons in Christian living through worship, the sacraments, spiritual disciplines, and other means of grace, such as Wesley's Christian conferencing;*
- *--send persons into the world to live lovingly and justly as servants of Christ by healing the sick, feeding the hungry, caring for the stranger, freeing the oppressed, being and becoming a compassionate, caring presence, and working to develop social structures that are consistent with the gospel; and*
- *--continue the mission of seeking, welcoming and gathering persons into the community of the body of Christ.*

The 2012 *Book of Discipline*, ¶120 - 122 uses the above words to describe the mission of The United Methodist Church. As we carry out our mission, we continually assess our faithfulness and effectiveness, offering our lives to Christ. Such assessment is a shared ministry.

What are we doing when we assess the ministries of one another? What are the processes we use? This tool invites us to think about these important processes, to pause and review the way we go about assessing our ministries.

Assessing Our Ministries

Valuing one another is basic to our baptismal vows in Christ. There are many relationships and settings in the church in which we are asked to give input and feedback, to evaluate, and to appraise. Also, we are evaluated, appraised, and given feedback. Most of this is not public. As members of the body of Christ, assessment is to be an expression of loving others because God first loved us.

Examine Your Assessment Process

An hour into the meeting Pastor Susan felt beat up by the Pastor-Parish Relations Committee. Some of the committee members were disturbed and exhausted by the tensions. It had been the annual “evaluation” meeting. Generally things at the church were going well, she had thought. It was her third year at First Church and she had not expected such harsh statements and questions about her ministry. Three of the committee members continually quoted negative comments about the pastor’s performance from anonymous people in the church. From a friendly start to the meeting, the process declined as the level of concern grew.

This scene is a composite of what happens in too many instances. What’s going on here? What’s the breakdown? How in Christ’s church could such a meeting take place? Fortunately in many churches such abuse does not happen. What is the process in your church? Use the following chart and questions to examine what you do.

Characteristics of Judgment-based Assessment

1. Procedures and tools focus on clergy performance in a variety of skill areas. Rating scales are frequently used to indicate clergy performance.
2. Persons participate as observers of the clergy person. This includes PPRC members, church officers and members, DS, other clergy. In candidacy and probation the observers include interview committee members.
3. The process of observing and commenting objectifies the clergy person or candidate, isolating him/her for purposes of scoring or rating. The subject of the process is put over-against the observers.
4. The assessment processes are for the purpose of drawing conclusions and making decisions: appointment-making, change of conference relations, local church processes.

Characteristics of Relationally-based Assessment

1. *Being* and *doing* are valued. Identity, roles, and performance are examined. Articulation of call, vocation, and attention to excellence in ministry are enhanced.
2. Those who provide input and feedback are companions in ministry and not solely “observers.” This affirms the ministry of all baptized persons and the church as community.
3. The process of evaluation draws participants closer together and thereby both offers safety and requires risk. All participants have some level of vulnerability in the process (though the levels differ.)
4. The assessment processes are done to clarify ministry strategies in the context of the church’s wide ministry options. Each person’s identity, role, and performance are engaged.

“Ironically, by focusing on performing for someone else’s approval, corporations create the very conditions that predestine them to mediocre performance. Over the long run, superior performance depends upon superior learning.” Peter Senge. “The Leader’s New Work: Building Learning Organizations.” Sloan Management Review, 32, no. 1 (Fall 1990): pp.7-23.

Excerpted from *Assessment: How We Do It* (ICOP 945018). Art Gafke, Division of Ordained Ministry, General Board of Higher Education and Ministry, The United Methodist Church, P.O. Box 340007, Nashville, TN 37203-0007.

Although the Minnesota Annual Conference does not recommend a particular instrument, more than anything else, you will want to create an environment for effective ministry. The following pages speak of ways to do that. There is a process to develop a ministry covenant as well as a discussion of performance reviews for all types of staff as well as two performance review instruments.

The chapter concludes with a summary of two particular systems of skills or competencies that are delineated in recent books by Jill Hudson and Ronald Sisk and published by The Alban Institute.

Creating an Environment for Effective Ministry

Clergy Support

Time:

Clergy in many ways work a 24/7 job. As an SPRC you can interpret to the congregation that a pastor's job is not 8 to 5 Monday through Friday, and that it is critical to a pastor's well being that they have time away from the parish. Each pastor is entitled to

- A day off each week, often Mondays or Fridays, to compensate for working on Sunday. A typical week has 21 potential work modules (morning, afternoon, evening). Full time work for clergy is on average 12 to 15 depending on the week. If your pastor is at the church more than 3 to 4 nights a week, you might want to ask if they are getting adequate family/personal time.
- Four weeks of vacation each year, including Sundays. After 10 years of experience this is increased to five weeks.
- A week, including Sunday, each year, to serve a conference camp or other conference work.
- A week, including Sunday, each year for continuing education.
- Every four years, pastors are encouraged to take a renewal/study leave of four weeks. This is in addition to their vacation time. Financial help for pulpit supply and pastoral care coverage is available from the Board of Ordained Ministry.

Compensation:

The Annual Conference has set minimum salary guidelines for all clergy. If your congregation has the resources to pay more than the minimum salary, you are encouraged to consider a process for giving merit increases. This assumes you are setting priorities and goals and conducting annual performance reviews.

- A simple way to do merit increases is for the SPRC to set a range that fits the congregation's budget. It may be in terms of percentage (i.e. 1 to 3%) or it could be actual cash amount (i.e. \$100 to \$1000). The amount given would be determined by the staff member's performance review. An outstanding rating would receive the maximum raise, an excellent mid-range, and good a minimum merit increase. Anything less than a good receives no merit increase.
- A merit increase does not take the place of Cost of Living increases. You want to make sure your compensation levels are keeping pace with inflation.

Non-Cash Benefits:

Often the church's budget does not allow for significant salary increases. There are other ways to show appreciation to your staff:

- Give them an extra Sunday off.
- Offer to baby sit their children for a weekend away, and give them a gift certificate for a bed and breakfast.
- Have a clergy appreciation Sunday.
- Send them flowers for no special occasion except to say we appreciate you.
- Host a staff dinner and have people give testimonies about the staff.

These are just a sample of ideas. Be creative and see what you can dream up.

Creating an Environment for Effective Ministry

Determining Priorities and Goals

Knowing Your Staff

- Soon after your pastor arrives, have a conversation about his or her strengths and passion in ministry. Have the pastor share any inventories they might have taken such as a Myers-Briggs Type Indicator. Another resource is the book *Now, Discover Your Strengths* by Marcus Buckingham or *Living Your Strengths* by Albert Winseman, Donald Clifton, and Curt Liesveld. As a team you might want to read either of these books, and have each new staff member complete a Gallup Strengthfinder inventory. The book tells you how to do this. You also want to talk about the pastor's working style, and what gives them energy and what drains energy.
- For each staff member, make sure you have in place a current job description that includes the responsibilities of this position.

Setting Priorities:

- Each year, sometime in the late spring, you will want to set priorities for each staff member's time. The SPRC works this process with the clergy, the lead pastor with the rest of the staff. The process always needs to be as a conversation with the staff person.
- Review the job description. For the pastor that can be found in the Book of Discipline ¶340.
- The conversation begins by the pastor and committee asking, **“given the scope of this job description, knowing our pastor's strengths and passion, what needs to be the priorities for his/her work in the coming year.”** You will want to set 3 to 5 priorities that are critical to the ministry of this congregation that the pastor must absolutely do if this congregation is to fulfill its vision and mission.
- You may also want to set some secondary priorities. Things that are not critical to the mission of the church for the coming year but would be nice to do. They might be things that the pastor enjoys doing such as teaching a Disciple class. It might be a thing the congregation likes having done, bringing communion to shut-ins, but recognizes that the pastor does not need to be the one doing this. Again, probably no more than 3 to 5 secondary priorities.
- After setting these, you need to make sure everyone is in agreement. Do these priorities help the church advance in living out its vision and mission? Does the pastor own these, is excited about them, and willing to work hard at them? If that is not the case, you need to go back and re-think these priorities or check out what is getting in the way. For example, are there different understandings of the role of the pastor, or lack of clarity about the direction the church is moving?

Establishing Goals:

- Once you have chosen three to five priorities, you then need to set goals for each of those priorities. So, for example, you and the pastor have agreed that the priorities for the coming year are Sunday morning worship, leadership development, and expanding the small group ministry. That tells you the areas the pastor will be working in, but not what he/she hopes to accomplish in each area and how they will go about it.

- Goals are concrete. They include qualitative as well as quantitative improvement. They are measurable and/or observable. Some examples might be:

Small Groups:

- We will have five more small groups this year led by laity. The pastor will invite and train these new leaders.
- Each small group leader will be coached in how to find and train an apprentice, so that we are building a cadre of new leaders.
- Small groups will be a place of community and faith formation. We will do this by providing high quality curriculum and providing a monthly training session for small group leaders.

Leadership Development:

- The pastor will work with the Lay Leadership team to develop a process for members of the congregation to identify their spiritual gifts, so that we have more people serving in their place of passion and giftedness.
 - To help people serving in the core ministry teams grow, the pastor will lead a teaching time for leaders for the first 30 minutes on the all church meeting night.
- Two to three goals for each priority are reasonable. If the goals are significant ones, this is all a person really can focus on.

Creating a Learning Plan:

- Once you have agreed upon priorities and goals, you then need to address any areas that the pastor might need to do some continuing education so they can effectively meet these goals. It may be attending a workshop, or doing some reading, or finding a mentor in this area. You will want to include those things in your plan, and make sure you have budgeted money and time for those learning events.

Checking In

- Complete a Clergy Excellence Plan with the pastor listing the priorities/goals and learning plan.
- Each month when you meet, check in on how it is going. Has the pastor been able to give his/her best time and energy to the priorities? If not, what is getting in the way, and how can the SPRC help? What kind of progress is being made on the goals? Remember, this time is to help encourage and support, not to micro manage the pastor. Sometimes in the course of a year, you realize that you chose the wrong priorities or goals, and they need to be adjusted, or that for these goals to be accomplished, other things have to happen first, so you go back and set different goals to allow those foundational things to occur. It is ok to make mid-year adjustments. That is why you do the monthly checking in.

Creating an Environment for Effective Ministry

Annual Performance Reviews

Rationale:

An annual time on reflecting on a staff person's goals and performance allows the staff member to receive affirmation for their work, as well as concrete feedback that will help them be more effective. It also allows the congregation a way for evaluating the staff member beyond personal like or dislike, which then is information for setting compensation.

Methodology:

The method is not as important as the consistency of doing the feedback every year. A congregation will need to establish how they want to receive feedback, and what process they will use to evaluate staff performance. Included here is one model. Feel free to adapt it to fit your setting, or to create something entirely different.

Staff Member/Supervisor Evaluation:

- The attached sample performance review lists a variety of performance factors. There are also lines to enter in a person's goals that they have set in conjunction with their supervisor and/or the SPRC. **The SPRC needs to create a form that reflects the performance factors important to your congregation.**
- The staff member takes the form and does a self-evaluation. The supervisor completes the form evaluating the staff member. For each performance factor or goal, a rating is given from Outstanding to Unsatisfactory. At the bottom of the form, a narrative is written reflecting on progress in the past year. The person then assigns an overall rating for the staff member. After they have each completed their form, a time is set for a conversation. The staff member and supervisor share the contents of each of their forms, and some notes are made about improvements needed, which become a part of the Ministry Covenant for the next year (see Determining Goals and Priorities). The staff member and supervisor both sign the performance review forms, and a copy is placed in the staff members personnel file.
- For clergy, the SPRC functions as the supervisor. The lead pastor or other designated supervisors would do the review for the rest of the staff.
- A copy of the performance review of clergy needs to be forwarded to the District Superintendent upon completion.
- The performance review of each staff member becomes information as SPRC determine compensation for the coming year. If the staff member receives a good to outstanding rating, it is recommended that some kind of merit increase be considered.

Full Circle Feedback:

Every two to three years, it will be helpful to receive feedback from the groups with which the staff members works. Again, this can be as in-depth or as simple as you would like to make it. For a sample of an in-depth survey, please refer to the book **Evaluating Ministry**, which is listed on the resource page.

- A staff member identifies 20 to 30 people from whom to request information. They may be a cross section of the congregation, members of a class they have been teaching,

a committee they have been working with, etc. You probably want to choose people that reflect the priorities areas of the staff member.

- If the staff member supervises other staff, you will also want to receive feedback from them. You may ask the same questions you ask of parishioners or vary them to reflect more the working relationship.
- The SPRC/supervisor sends either a letter asking the person to give you feedback regarding the staff member's work.
- Some sample questions might be:
 - How has this staff person help you grow spiritually?
 - What has gone well in the past year in your interactions with this staff member?
 - What do you appreciate about this staff member's leadership/work?
 - If there were one thing this staff member could do that would enhance the effectiveness of the ministry of this congregation, what would it be?
 - Any other comments you would like to make?
- Have a place for people to sign their response. The supervisor or SPRC should be the one to receive these responses, and then collate the answers. A summary sheet would be shared with the staff person, and a conversation about what the responses reflect about the staff person's relationships and performance.

A Final Note:

The Annual Performance Review is done in conjunction with the setting of priorities and goals. If you are doing a monthly check in on progress, there should be no surprises in the annual review. The point is not to try to discover things going wrong, but to celebrate what is going right, and to better focus time and energy that helps the congregation more effectively live out its mission and ministry.

8 CHARACTERISTICS OF EFFECTIVE CLERGY TO LEAD CHURCHES IN REACHING NEW PEOPLE AND CULTIVATING SPIRITUAL VITALITY

- **A personal passionate faith:** Deeply loves God, expresses a vibrant spirituality and lives a holy, healthy, grace-filled life that is evidenced by an ability to articulate the difference Jesus Christ makes in their life and the consistent practice of the means of grace.
- **An evangelistic heart:** Loves people and passionately desires to see lives transformed through a relationship with Jesus Christ by committing themselves to leading congregations to reach the least, lost and left out and inviting people on a journey towards radical discipleship resulting in people growing spiritually and the church growing numerically.
- **Invites, forms and send disciples:** Inspires, engages and motivates others by preaching the good news with conviction, prepares and leads excellently executed worship services that connect people to God, each other, and the needs of a seeking world, casts a compelling vision of what it means to be the body of Christ, offers a thoughtful Wesleyan theology that is relevant and meaningful to people's everyday lives, and unashamedly calls people into a life of stewardship where they offer joyfully their prayers, presence, gifts and service to the work of the kingdom.
- **Effective leadership skills:** Thinks and works organizationally by creating, managing and navigating systems; developing and implementing strategic ministry plans; building teams and influencing others to achieve common goals; initiating change and managing conflict so as to increase a congregation's capacity for change and ability to address adaptive challenges; and adjusting their leadership style to fit the context.
- **Holy, healthy habits:** Sustains themselves for ministry by having a healthy, interesting personal life that is appropriately balanced with their vocational work, expressions of which are clear personal and professional boundaries; practices of good self-care; life-giving relationships outside the church; interests and hobbies that lead to a well-rounded life.
- **Emotional and social intelligence:** Demonstrates self-awareness, interpersonal skills, self-confidence, emotional self-control, authenticity and empathy for others.
- **Life-long learner:** Seeks to be a life long learner and makes the investment in on-going personal and professional development.
- **Love's God's world:** Embraces the world as their parish, and therefore expects to be connectional in ministry, awake to the large, diverse world in which we live, and deeply engaged in working towards God's shalom for all people.

CONGREGATIONAL MINISTRY PLAN

A. Introduction

Name of Church:

Starting Date:

Targeted Completion Date:

Reach New People Strategic Ministry Track We Are On:

Natural Church Development Minimum Factor:

Natural Church Development Maximum Factor:

B. Context for Ministry

1. Community

How do you describe the community your church is called to reach and serve? What are the key attributes of this community? What changes have you noticed occurring in your community that have implications for your future ministry?

2. History

Record the following information for the past five years.

Year	Avg. Worship Attendance	Avg. Sunday School Attendance	Membership	# of Professions of Faith	% of Apportionments Paid

As you reflect on the data above, what explanations would you give regarding upswings or downturns in the data?

C. Clarity and Agreement on the Foundational Building Blocks of a Ministry Plan

1. Purpose

Why do we exist? What are we called to do and be now, in this time and place?

2. Principles

What values will guide our life and decision making?

3. Promise

What can the community always trust or expect from us?

4. People

Who does our heart break for? Who are we passionate about reaching?

D. An Analysis of Our Congregation’s Strengths, Weaknesses and Opportunities

Strengths to Build On	Dysfunctions in Our Congregation That Need to be Fixed
Opportunities for Mission in Our Community	Aspirations We Sense God Calling Us to in the Next Three to Five Years

E. Setting the Vision and Goals

1. Vision

What would “success/fruitfulness” look like three to five years from now?

2. Long Term Goals

What results will we have accomplished in order to reach our vision in three to five years?

3-5 Year SMART* Goals	Yearly Milestones

* SMART Goals are **S**pecific, **M**easurable, **A**ttainable, **R**elevant (to Vision, Mission, and Ministry Plan), and **T**ime-Bound

3. Current Year Outcomes

What outcomes will we accomplish in the coming year to move us toward our long term goals?

Outcome (Yearly Milestones)	Action Steps	By Whom?	By When?

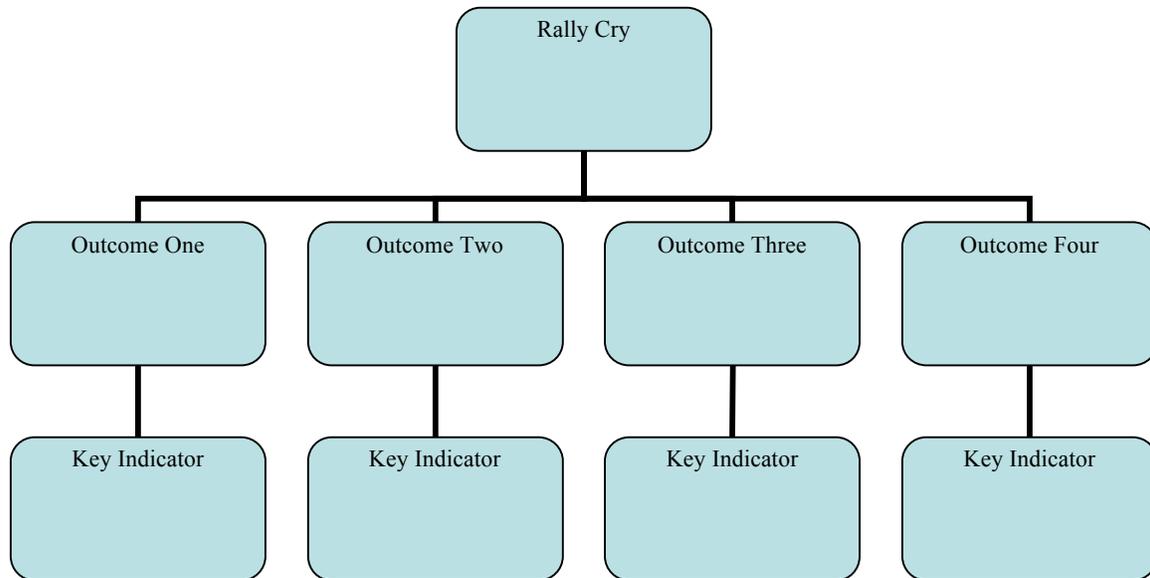
4. Rally Cry

What is theme or message that we will use this year to summarize our outcomes and communicate them to the congregation so that they can understand and grab onto them and see how they are guiding our work in this year?

5. Benchmarks for Health and Vitality

What key indicators do we want to pay attention to about our overall congregational health, vitality and effectiveness? (Refer to “Practices of Fruitful Congregations” for ideas.)

F. Use a Scorecard to Review Progress



Clergy Update—Take some time to reflect on your ministry this year both in your personal life and your professional life.

Name: _____ Church/Charge: _____ First Year in Current App't: _____
Strengthfinders (5): _____

Support and Prayer:

What are you celebrating in your life and ministry?

What Holy Spirit breakthroughs are you discerning? What brings you joy?

What if any are family concerns or transitions that you would like the cabinet to be aware of?

How do you tend your own spiritual life?

Are there other concerns? What is most important for you to share during our time together today?

How are you supported by or supporting other ministry colleagues?

Self-Review: Eight Characteristics of Effective Clergy: Which two of the characteristics are particular strengths for you, or are most fulfilling? Which two areas are challenging to you? How can your DS assist you in this?

A personal passionate faith:

An evangelistic heart:

Invites, forms, sends disciples:

Effective leadership skills:

Holy, healthy habits:

Emotional/social intelligence:

Life-long learner:

Loves God's world:

Mission and Ministry Planning

Mission: To make disciples of Jesus Christ for the transformation of the world.

Vision: Every congregation expresses the scriptural imperatives: reach new people, cultivate spiritual vitality, and heal a broken world.

Vision Pathways: equipping missional congregations, developing missional leaders, generating missional resources, and extending missional impact.

Is there an intentional ministry plan in use in your local church/charge?: (circle one) Yes OR No

If “Yes”, what method does your church use to create, review and update their ministry plan?

Has the ministry plan been reviewed and updated by your SPR and Council? If so, when? Please attach your church ministry plan in whatever form your church uses.

If there is “No” plan, what steps do you intend to take to develop one? When? Do you need assistance?

The following is just one example of a template that could be used.

Congregation Ministry Plan

Short-Term SMART (Specific, Measurable, Aligned to the mission, Realistic, Time sensitive) Goals	Currently Doing?	What will we try next? (within the coming year)	Long-Term Goals
1. Reaching New People (System) Have you considered Missional Journey, Healthy Church Initiative (HCI), or other resources to help you discover new approaches? Would you like more information about these? Contact our Congregational Development office: Gail.Johnson@minnesotaumc.org			
2. Cultivate Spiritual Growth (System) Have you talked with some of our resource people to check out new resources and ideas? Ask me for names and contact information if you are looking for help in this area.			
3. Healing of a Broken World (System) Have you scheduled a visit with our Director of Missional Impact, Lyndy Zabel and some of your key lay leaders? Lyndy is interested in hearing what you are already doing and he can also offer resources/ideas if you are looking for new ideas. His email is: lyndy.zabel@minnesotaumc.org			

Clergy Development and Continuing Education Plan

Continuing Education and Renewal Goals from 2013	Completed during the past year	Planned for current year 2014	Longer-term development 2015
1.			
2.			
3.			

Just a sample of ideas to prime the pump for skill building and renewal

The Church of the Resurrection Leadership Institute
 Stewardship events sponsored by our foundation
 Soul Leaders
 School of Congregational Development

New Opportunities Coming this Fall for Clergy:

Clergy Leadership Academy- this will sharpen your leadership skills in many areas. This will be a three year commitment. Applications will be out this summer.

Clergy cluster groups designed for peer learning and support. Please let me know if you are interested in being a part of this. These groups will be voluntary and structured around loving, learning and leading. This is a year commitment.

Urban Ventures Cohort: I am forming a partnership with Urban Ventures to pilot a cohort group which will start in the Fall of 2014. This group will be led by Art Erickson who founded Urban Ventures after growing the youth ministry at Park Avenue to 1600 students in the 1970's. He knows how to identify a neighborhood and work it as a parish, forming community partnerships and meeting real needs. This is called Urban Ventures but the principles are applicable to a variety of settings. Art has a proven track record in developing over 100 leaders who now lead churches, parachurches and non-profits across the nation. **Would you like more information about this?**

Appointment Notes and Requests:

What level of personal enthusiasm do you have for your current appointment?

As you look to the future, what do you hope to accomplish in the church and neighborhood before you ask for a new appointment?

What excites you most about your current appointment? What struggles are you facing? How could your DS partner with you in addressing these struggles?

How long do you feel called to continue in the current appointment?

What would you consider most important in a future appointment?

Are there geographical or other limits to full itinerancy for you? If so, what are they?

What other information do you wish to share with the Cabinet?

Would you like a consultation appointment in December?

When do you anticipate retirement?

Advisory Form on Limited Itinerancy (2014)* *This is not required for deacons, certified lay ministers, or licensed local pastors:* All parties in the appointment-making process are called to work in covenant to assist every local church in “making disciples of Jesus Christ for the transformation of the world.” One part of the covenant of itinerant ministry says that every Elder, Elder-track person and associate member in good standing and who continues to demonstrate effectiveness in ministry will be appointed if feasible. The covenant does not, nor should it, guarantee or promise any particular salary beyond minimum salary, location, size of church or worship attendance. It is sometimes necessary that the seriousness of other covenants we have made (such as marriage, parenting or elder-care) must take priority over the commitment to itinerate. If this is the case for you for the ensuing appointment year, please fill out the remainder of this form to advise the Bishop and Cabinet of the same.

During the current appointment year my ability to itinerate is limited in the following ways: (Please state geographical or other limitations; and the covenantal reasons why they take precedence over your commitment to itinerate.). I ask that you honor these limitations and I understand that (check all that apply):

() In order to receive an appointment in my preferred geography, I may need to take a salary cut, and am willing to do so.

() In order to receive an appointment in my preferred geography, I am willing to serve less than full time.

() It may not be possible to appoint me within the geography that I have specified. If that is the case, I am willing to:

() Take a leave of absence or family leave.

() Consider an appointment beyond my preferred geography.

Signature of Pastor

Date