Annual Evaluation for Clergy

From the *United Methodist Book of Discipline, 2020/2024*:
¶ 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. *For clergy serving local churches, the district superintendent, in consultation with the pastor-parish relations committee, will evaluate annually the pastors' effectiveness for ministry (¶334.2c, 419, 634.2o, q), using criteria, processes, and training developed by the cabinet and the Board of Ordained Ministry.* ***The clergy 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])*** *[emphasis added], 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 following annual evaluation process to be used for all clergy appointed to local churches. The goals of this "formative evaluation" process are an enhanced ministry-relationship between the pastor(s) and the congregation and fostering effective pastoral ministry through celebrating pastoral strengths while developing a specific action plan for pastoral growth. Regardless of the pastor's appointment projection for the coming year, this evaluation process is relevant to their call and effective pastoral ministry in any setting.

This evaluation should be conducted between March and May. The Evaluation and Action Report is **due to the district office by June 1, annually**. A reminder email will be sent from the district office by March 15. Information can be found on the conference website at www.vaumc.org/SPPRCResources, under **Section 5: Annual Evaluation**.

This evaluation process can be followed for all staff with some modification in consideration of their role and employment.

Resources to use in the annual evaluation:

- *Characteristics of Effective Clergy* (direct download link)
- *Responsibilities and Duties of Elders and Licensed Pastors* (*Book of Discipline 2020/2024, ¶340)*
- Job Descriptions for Appointed Deacons, Associate Pastors, or lay staff employees
- Congregational Goals, Vision, Mission and Core Values
- The congregation's reports to the Charge Conference and Year End Statistics uploaded into the Conference's Unity database. Specifically, data on membership, community engagement, and stewardship under the pastor's leadership.

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Steps for an Effective Evaluation

These steps should be performed by all members of the S/PPRC and by the clergy or staff member

- Prepare by reviewing ahead of time the applicable resources listed on the previous page and evaluation materials from the conference website.
- Review and interpret your church's effectiveness by reviewing statistical data found in the Conference Unity database. Data should be distributed to the committee a few weeks before the meeting. If you have trouble signing in to Unity, please contact your district office.
- The clergy as well and the committee members should reflect on the evaluation questions before the meeting and make some notes.
- Begin and end the meeting with prayer or centering worship.
- Clarify boundaries and remind participants of the need for confidentiality.
- Communicate clearly, use specific examples, and listen carefully.
- Allow adequate time for honest feedback.

Suggested Questions for Collaborative Conversation

- Using the "Characteristics of Effective Clergy" resource (direct download link), which three to five of these characteristics do you believe are strengths for this clergyperson/you?
- What examples can you offer which highlight these strengths in action?
- Which three to five of these characteristics do you believe are areas where the clergyperson could grow or develop further in order to be more effective and to help the congregation be more fruitful?
- What actions could the clergyperson/you undertake which might strengthen them/you in these areas?
- Reviewing the congregation's data, reflect on the pastor's role in leading the following items:
    - How is the pastor empowering the laity to engage new people? See membership data and ministry engagement data.
    - Are missions and outreach ministries focused more on building relationships rather than simply giving resources away? See giving data and engagement data.
    - How is the pastor empowering laity to lead in the areas of discipleship formation? See data on small groups and Christian formation.
    - How is the pastor empowering laity to lead in areas of generosity and stewardship? See giving and spending data.

During the evaluation, review the answers to these or similar questions. Where did answers align or diverge? At the conclusion of the evaluation, the chair and clergyperson will jointly complete and sign the Evaluation and Action Plan.

Filling out the Evaluation and Action Plan

The Clergy Evaluation and Action Plan is entered into the Conference's Unity database. To do so:

1. Log into Unity, click on your Charge, then ***Clergy Evaluations***.

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2. To create a new report, click on ***Add New Evaluation*** and enter the evaluation date. If multiple clergy are appointed to the Charge as of that date, the system will then ask you to specify which person to evaluate.
3. A new evaluation form will appear and prompt for the questions below. Fill out the answers in the boxes provided and click the ***Submit*** button. Please note that this evaluation form is a secure form, and will time out after a while. It is ***very, very strongly*** encouraged to fill out these answers first in a text document (Word, notepad, etc) and then copy/paste the answers into the online evaluation form when complete. This prevents potential loss of work and makes the online portion submission process very quick.
4. After the Clergy Evaluation and Action Plan has been submitted, use the ***View*** button to view to show a printer-friendly version of the evaluation, complete with signature lines. Print out a copy of this report and have all relevant parties sign it.
5. Scan in a copy of this signed evaluation, and use the ***Attach*** button next to the Clergy Evaluation form to attach this scanned document to the evaluation.
6. This evaluation form should be completed and submitted by **June 1** annually

Questions present on Clergy Evaluation and Action Plan

1. After collaborative conversation, write a brief paragraph summarizing the evaluation of the clergyperson, including highlights of areas of strength.
2. List one or two areas for the clergyperson to focus on in the coming year in order for them to grow in effectiveness.
3. Detail two or three specific actions (in total) the clergyperson covenants to take in the coming year to address the identified areas of growth.
4. In order to accomplish these goals in the next year, how will the clergy and lay leaders work together to remove some things from the clergy workload to make the goals possible?
5. Reflecting on the action plan from question 3 of last year's Evaluation and Action Plan, were these actions undertaken? If not, why not and what would support the clergyperson in being more successful in the coming year? If so, what was gained from the experience?