

PASTOR/SESSION PERFORMANCE REVIEW PROCESS

The Commission on Ministry (COM) advocates that sessions critically review the performance of the pastor and the session as separate entities as well as their work done together as a team. Further, the Validated Ministry Policy of the Presbytery of East Iowa (approved June 9, 2015) requires that each validated ministry within the Presbytery “be carried out in accountability for its character and conduct and is answerable to the Commission on Ministry on behalf of the Presbytery for agreed upon end results or activities with a face to face review of the ministry on a yearly basis.” COM has been requested to provide guidance to accomplish these appraisals and has presented several alternative methods below. Churches do not all function in the same way, so an appraisal system that works well for one may not be as effective for another.

The models presented below range in detail and complexity, but they are most effective when they are structured to fit the size, staffing model, church culture and administrative style of the pastor, session and church staff. In all cases they should be accompanied by a face to face meeting between the appraiser and the pastor, session or committees being appraised. This meeting should be used to further clarify each element of the written appraisal and to encourage discussion among all parties. Also in each case the person being appraised may be asked to complete a written self-appraisal to be considered along with the appraisal models presented below. Each of the models would work best with a form customized to the particular church. A form is attached below.

- Churches and sessions should develop written mutual goals and expectations agreed upon between the session and pastor(s). Such a process should occur as close to the beginning of each calendar year as possible. These documents may include a simple listing of goals for the pastor, goals for the session, and goals shared mutually by the pastor and the session. The appraisal process would then include a listing of each goal agreed to with concrete expectations for measureable results. This approach provides the pastor and session with a clear understanding of what is expected during the year and a basis for appraising actual outcomes against expectations.
- A second approach involves appraising performance against each element of the position description. This process assumes that there is an up to date written position description for the pastor and a clear understanding of the role of the session as stated in the Book of Order, that the pastor and session share an agreed-upon understanding of these descriptions, and that each element is concretely defined. In this process, the appraisal would consist of listing each element of the description, followed by a narrative of how performance addressed each element, and with the option to include whether such performance had exceeded, met or fallen below expectations. The advantage of this approach is that the elements to be appraised are already defined. The disadvantage is that many job descriptions are too general or ambiguous to serve as a realistic basis for measuring performance.
- Pastors and sessions are responsible for many elements of church life, but they don't all carry the same degree of priority or importance. Another more detailed approach involves defining the areas and concrete elements for which each party is responsible and then placing these in three or four categories of priority. Performance appraisals for the pastor and for the session can then consider each element, but the performance concerning top level priorities would count more than for lower level priorities. A point

system can then be developed based on the performance ranking of each element and its priority. This system is especially effective when a detail, sophisticated appraisal is necessary, but it is too complex for most churches since it requires more processing and depends upon consistency over time, even if different folks are involved in the process from year to year.

- The appraisal process represented on the form below is the one most frequently employed by churches. It prompts the appraiser to state the agreed upon goals and appraise the performance of the pastor in achieving the results of each one. It also contains a number of questions that facilitate three levels of grading and specific commentary. The advantage of this model is that it makes clear that the setting of goals and expectations is essential and that there are elements in the performance of the pastor and session that go beyond achieving these goals. It also provides several specific questions upon which to base the performance appraisal.

NAME OF THE CHURCH

ANNUAL PASTOR/SESSION REVIEW

**Name of person or committee
conducting the review**

Name of the pastor

Date

Prepared by (if different from above) _____

PERFORMANCE ON GOALS AND EXPECTATIONS

List or attach the mutual or reciprocal goals or expectations that were agreed upon at the beginning of, or during, the current year between the pastor and session. If necessary, use a separate sheet to list the goals/expectations, or attach the document containing these that was prepared earlier in the year.

Then summarize the accomplishment of or progress toward accomplishment of each goal/expectation and provide an overall ranking for each goal of (1) Exceeded Expectations, (2) Met Expectations or (3) Below Expectations along with comments to clarify the ranking.

ADDITIONAL PERFORMANCE FACTORS

Consider the necessary skills to fulfill the job responsibilities, including communication, follow-through, and working with others.

(1) Describe the strengths or skills of pastor to fulfill job responsibilities. Describe how the session is organized to fulfill its responsibilities and how well it has done so.

(2) Describe any noteworthy accomplishments of the pastor or session that has not already been noted above.

(3) With reference to the mutual expectations, describe any areas for improvements that should be communicated for the pastor's or session's consideration.

(4) Describe any significant areas of mission or ministry that the pastor and the session should focus on in the coming year.