A MODEL FOR EFFECTIVE EVALUATION

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A MODEL FOR EFFECTIVE EVALUATION

Chapter 1

HISTORICAL DEVELOPMENT

The United Methodist Church does not have a choice about whether evaluation of pastors and churches will be done. The question is only how will evaluation take place. Evaluation of clergy takes place in either informal or formal ways. Informal evaluation happens whether we like it or not. Over Sunday lunch someone asks, "What did you think of the preacher's sermon today?" Friends on the telephone discussing a shut-in ask, "Has the pastor been to see her recently?" In a cabinet meeting a bishop asks a district superintendent, "Hasn't Pastor Y. moved above the level of his ability to function well?" District Superintendents look monthly at apportionment payments, new members added and attendance figures and make judgments about what is happening in a particular ministerial setting. Often these evaluations are never shared with the person being evaluated. And such evaluations are made with very limited data. Perhaps there is a way to formalize evaluation so that the pastor, the congregation and cabinet/bishop can have access to accurate information; can with fairness
discuss the leadership, ministry and mission of the church; and can empower vital ministry and mission in the church.

For the last twenty years the United Methodist Church has sought formal ways to discuss, develop, evaluate and empower effective ministry. The 1968 Discipline of the United Methodist Church organized the local church into five work areas through which the local congregation performs its ministry. A list of thirty specific pastoral duties were identified and candidates for elders orders and full connection in an annual conference were required to answer or qualify according to thirty-six questions or qualifications. This process has been modified by each succeeding General Conference.

In 1980 evaluation was made a primary expectation of the appointment of a pastor to a church and evaluation was linked to continuing education. The cabinet and board of ordained ministry were asked to establish criteria, procedures and training to make evaluation possible. By 1984, the Discipline of the United Methodist Church continued this emphasis on evaluation, listing eleven work areas for effective ministry, sixteen functions or duties of a pastor, six knowledge competencies required of a pastor and twelve personal characteristics and qualities needed by a pastor.
In the *Handbook for Ordained Ministry, 1985* - 88, prepared by the Division of Ordained Ministry, General Board of Higher Education and Ministry, this process is fleshed out in a discussion of four closely related issues: definition and identification of effective ministry, supervision for effective ministry, evaluation of effectiveness in ministry, and continuing education for further improvement in effectiveness. Further, the Division of Ordained Ministry has given district superintendents, churches and pastors manuals with suggestions for carrying out a four-way process of supervision evaluation involving the District Superintendent, the pastor, the local church Pastor-Parish Relations Committee and the local Church Administrative Board or Council. Numerous workshops and training sessions have been offered to assist the process.

The intent of the *Discipline* of the United Methodist Church and the Board of Higher Education and Ministry is clear. Formal evaluation is to take place. The District Superintendent, the local charge Pastor-Parish Relations Committee and the pastor are partners in enabling the pastor and the church to understand and evaluate effectiveness in ministry and how that effectiveness can be enhanced.

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Evaluation, however, is not just the law of the church. Other disciplines tell the church evaluation is essential to effective management in business, in education, and elsewhere. It makes sense to learn from the experience of others. To do adequate work in discovering the best approach to evaluation as a church, there is a need to do what John Wesley called "plundering the Egyptians." There is a need to know what business and education know about evaluation and let that interact with theology and ecclesiology as an evaluation process is developed for the church.

Every organization, including the church, needs processes for (1) assessing the effectiveness of persons who work for it, and (2) helping those persons grow in effectiveness.

Supervision with accompanying evaluation has also been found to enable the freedom necessary to do excellent work. Yeager says the professional in all fields needs supervision to free him or her from the following tyrannies that prevent effective work: (1) unstructured time and no report points; (2) unclear goals; (3) unrealistic goals; (4) unrealistic opinions of personal competencies, (5) unresolved conflict between an internal call and the expectations of others; (6) undefined standards for evaluation; (7) lack of mid-course correction; (8) faulty communication; (9) limited tender loving care. Experience in management suggests that "an

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effective system of accountability, evaluation and supervision" is essential to competent, successful work.3

Yet there is a call to evaluation that goes deeper than the practical awareness that informal evaluation is already happening and that other institutions in society such as business and education find formal evaluation useful. This call to evaluation is even more commanding than the law of the church. This call to evaluation is the place where the law of the church is grounded: a theology of the church and of Christian discipleship. The church is the people of God, called separately and corporately through faith in Jesus Christ to be in fellowship and mission. To respond in commitment to this invitation means joyful acceptance of God's love and grace and forgiveness and a corresponding acceptance of one's responsibility to be in relationship to God, the church and the world, and to be accountable to God and the church for one's actions and continued growth in discipleship. Dick Yeager expresses this well:

Daily the Christian is encouraged to have private meditation, where there are acts of self-analysis, confession, and the receiving anew of God's acceptance and forgiving love. Weekly, Christians gather as a part of their public worship in the act of confession and the welcome words of

assurance. There is the constant exposure to analysis, forgiveness, and renewal.

David L. Watson, who has written extensively in the area of growth in discipleship, similarly suggests that growth in discipleship means being accountable to God and each other for how one lives one's life, understands and offers one's gifts, and does one's ministry. Gifts and calls differ within the body of Christ and persons are responsible to God and each other to help one another discern gifts and roles.

If ministry is to be tensile rather than brittle, seasoned rather than euphoric, the direct and intuitive call must be subjected to criteria of professional competence. In this way the call is confirmed and strengthened and saving discipleship through Jesus Christ is offered with integrity.

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Chapter 2

Resistance to Evaluation

The call to evaluation is clear, but the resistance of both clergy and laity to the evaluation process is equally clear. A primary factor in this resistance is fear. William C. Jones in his study asserts clergy are afraid that persons will use evaluation to try to hurt or destroy them. Jones' assessment is confirmed by my experience. One of the most competent ministers I know indicated he would move or even retire before he would participate in a process of evaluation with the Pastor-Parish Relations Committee. An experience with an angry, poorly trained and unguided committee had shaped his very definite and very defensive posture toward the process of evaluation.

A further example of the strong resistance and deep fear which the topic of evaluation elicits is a letter to the editor of Circuit Rider.

...The clergy evaluation system is at least as popular as having a rotten albatross hung about one's neck...it will serve to undermine the quality of our ministry by making survival

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dependent upon smooth operators who sacrifice principle to flattery and manipulation.

Second, for clergy, as for all persons, an invitation from old ways to new ways is unsettling. During the last 15 years the church has adopted new orders of service and alternative liturgies for all seasons of the year. There has also been a strong invitation to try lectionary preaching. Both have met resistance among established clergy. Several clergy have shared with this author that they know the old liturgy and it feels comfortable and that trying the new makes them feel vulnerable and uneasy. As Callahan notes in *Twelve Keys*, persons need to build confidence and competence in the early stages of any effort to operate in new ways. An early success is necessary to reinforce different behavior. Change must involve ways to build, not destroy, self esteem or it will be avoided at great cost.

Third, clergy, as the rest of the culture, have had prior poor experience with evaluation. They remember experiences in high school and college where the standards for evaluation were haphazard, unfair, personality-related, or just inept. Some of these experiences have been with inept evaluation that was trivial, meaningless, and/or routine. Every person remembers silly tests and meaningless

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grades. But persons also remember destructive evaluations. An incident of cruel, self-serving evaluation such as asking a child to do, in a public setting, what he or she obviously cannot do is in the memory bank of most persons. These bad experiences color how persons view evaluation in their present setting.

Laity are also ambiguous in their feelings about the evaluation process. Laity are uneasy with evaluation because they view evaluation as being critical of their pastor or disloyal to their pastor. A pastor is a person one might need when illness, death, and/or other tragedies occur. If one has been critical of the pastor and alienated the pastor, a needed support system has been destroyed. Similarly, laity are often grateful for the pastor's action and/or presence in a particular setting and they feel disloyal, even tacky, evaluating this person who has been kind to them when they needed kindness.

Second, like clergy, many laity have had prior poor experiences with evaluation at work with their supervisors and earlier in school, home and even play settings. They have some experience of evaluation as unfair and/or inept. They do not want to be unfair or inept. Other laity, however, have had positive as well as negative experiences with evaluation. These persons have experienced on-the-job evaluation as a valuable, expected part of their work in education and in industry. These persons want the church to
move ahead with a competent fair process of evaluation in their relationship to the pastor.

Resistance and fear are high when evaluation is discussed. The identified problem is to devise an effective process of evaluation which accomplishes the goals of the Discipline of the church, the church's theology, and the church's interdisciplinary knowledge and one which also overcomes some of the resistance, fear and pitfalls which both clergy and laity feel about evaluation. The mandate to have evaluation is clear, but the execution of that mandate is complex, painful and difficult.

But evaluation is the process that enables the Christian and the church in the present moment to take full advantage of learning from past performances in preparing for the reaching out to future goals and possibilities.¹

¹ Yeager, "Theology as a Starting Point," p. 2.
Chapter 3

Factors in Empowering Effective Evaluation

Factor 1: A clear, mutually agreed upon basis for accountability/evaluation.

McConkey notes that one roadblock to evaluation of managers in the business world is "...they do not want, or believe it is not possible to establish the accountability on which they will be measured." Clergy often make the same statement, believing ministry so complex that no evaluative instrument can be adequate to the task and will therefore have more potential for destroying than enabling ministry. The first requirement of effective evaluation is to have a clear, mutually agreed upon statement of the basis of accountability and evaluation. Fuzziness about the basis of the evaluation creates conflict and uneasiness, as well as a self-protective conviction that no one really understands the pastor's ministry.

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Factor 2: Focuses on ministry goals not on the person or personality.

The person of the pastor is not the appropriate central focus for evaluation. Dealing with the person as pastor has great potential for destructive activity. Yet, as Loren Mead rightly asserts:

The person of the pastor is a key tool of the trade. The pastor's ability to be deeply and personally involved with the people in the parish or community directly affects the quality of what happens to them in pastoral care. Deeply personal, fully subjective interactions are the stuff of the work of the pastor. Thus the very qualities that are essential - personal involvement and deep subjectivity - are precisely those qualities that are most difficult to assess. A pastor who is doing well at his or her craft will engender strong personal feelings - both positive and negative. The strength of those feelings makes clarity of assessment difficult.

The central focus of evaluation is not the person of the pastor. Here we need two qualifiers. First, the District Superintendent is pastor to the pastors and must be open to the needs, hurts, concerns and development of the pastor as a person. Second, when there is an openly recognizable personality or psychological or moral dysfunction in the pastor, the District Superintendent and/or the Pastor-Parish Relations Committee are called to act. But effective evaluation, especially in the current atmosphere of fear and

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Loren B. Mead, "Evaluation of, by, for and to the Clergy" (Washington, D. C.: Alban Institute, 1977) p. 3.
suspicion, must not be focused on the person or the personality of the pastor. Indeed, as McConkey suggests out of his business experience:

Personality factors enter into the process only when they may be exerting a material impact on the ability of the manager to achieve his [sic] objectives.\textsuperscript{12}

The focus of evaluation is not on personality but on missional results, on accomplished goals.

Factor 3: Adult learners are self-directed.

June White asserts that evaluation of pastors involves the field of adult education. Her findings suggest that adults learn best in self-directed settings. Effective adult education according to Knowles, involves persons in a penetrating analysis of higher aspirations and the changes required to achieve them, the diagnosis of obstacles that must be overcome in achieving these changes, and the planning of an effective strategy for accomplishing the desired results.\textsuperscript{13}

White defines the goal of continuing education as creating opportunities to re-establish the meaning and purpose of ministry, assess and define strengths in that ministry, create a secure climate of acceptance, and


provide activities and materials that update knowledge with the chance to practice new behaviors.

Her work suggests that needs assessment or diagnosis should take place before, or at least as a part of evaluation. She cites work by G. V. Glass and James Raths that supports the idea that numerical scoring of effectiveness does not help persons to be more effective, but that effective persons do respond to evaluations of their performance.

In White's research model, persons reflected on their call and ministry in light of the eleven basic qualities of an effective congregation and the twelve functions of pastoral ministry as set forth by the Division of Ordained Ministry, 1984; listened to peer responses and then formulated learning plans based on this reflection and interaction. White's focus on the qualities and functions of effective ministry seem to help the learner balance personal and congregational needs.

Factor 4: Self-awareness and change thrive in a secure environment.

White's research further suggests that another component of effective evaluation is the offering of a secure

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environment in which persons may analyze their ministry in view of the tradition, the Discipline, prayer and meditation, and peer feed-back. In such a setting persons can diagnose needs, discover alternate behavior possibilities and develop plans to grow and change. Opportunities to grow in self-awareness are a critical part of supervision and evaluation.

Leadership and effectiveness can be learned, according to Callahan and Drucker. Callahan suggests that the kind of evaluation a person experiences helps shape the kind of leader he or she will become. His research indicates that self-initiated evaluation which focuses on improvement enables pro-active intentional, relational and missional leaders. While externally imposed evaluation seems to shape persons into reactive, passive leaders whose chief goal is to please the organization and/or institutions. He maintains that persons learn leadership

In an environment where there is (1) an excellent match between his or her competencies and key objectives; (2) a clear job description with genuine authority and (3) a self-initiated evaluation that focuses on improvement.

Peter Drucker asserts that effectiveness is "a self-discipline," "a habit or complex of practices," and "can be learned." He believes that feedback, supervision, and evaluation which enables self-awareness and change are

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15 IBID., p 75.
critical to developing the learned habits necessary for being an effective executive. 16

Factor 5: Evaluation - continuing education linked.

Evaluation involves continuing education. Continuing education events, as those described by White, enable self-assessment. Similarly when evaluation is completed it leads one to study and to learning activities. As Jones notes, 

evaluation is a process, if carefully done, which helps to identify areas of ministry and skills in ministry where we need to grow.17

In this sense evaluation becomes the process which feeds and informs continuing education. The District Superintendent needs to facilitate this result. McConkey is correct.

Once the results of the manager's achievements have been evaluated, the final chore of the superior is to translate them into meaningful and constructive suggestions for the continuing development of the subordinate. 18

16 Drucker, Practice of Management, p. 166.
17 Jones, "Impact of District Superintendent." p. 131.
18 McConkey, No Nonsense, p. 203.
Factor 6: Pastors and Pastor-Parish Relations Committees need training in order to be effective in the evaluation process.

William C. Jones, in his extensive pilot project with three churches, three pastors, and three Pastor Parish-Relations Committees concluded that his presence had been necessary to prevent the evaluative session from becoming destructive but that with training and guidance, both pastor and Pastor-Parish Relations Committee grew in capacity to communicate and to be in ministry. He grew to appreciate how unprepared Pastor-Parish Relations Committees are to do their work without some kind of training. Effective evaluation can not take place unless pastors and Pastor-Parish Relations Committee's are equipped to participate in the process.

Certainly training is needed for Pastor-Parish Relations Committees to function appropriately in the evaluative process, but it is important to affirm that clergy and laity are partners in ministry and both care deeply about the church and its mission in the world. As one participant in the 1988 Third Year District Superintendents Consultation affirmed:

We are discovering that laity are becoming more astute in defining the mission of the church and therefore their input into the consultation
Training enables this competence and commitment to be more effectively utilized in the mission and ministry of the church.

Factor 7: Focus of evaluation is on ministry goals, not on judgment and a resulting set of rewards and punishments.

Evaluation must avoid a reward and punishment focus which creates fear and uneasiness. William C. Jones, in his study of evaluation cited earlier, concluded that unless evaluation can be separated from a concept of judgment and punishment it is doomed to failure. Yeager and other authorities agree.

Jones cites a 1984 study by Philip Alexander of Ann Arbor Consulting Associates which suggests that an evaluation involving a rating system with a numerical scale is neither reliable nor valid. When an external person such as the District Superintendent or the Pastor-Parish Relations Committee does the rating such a system seems to measure


\[20\] Jones, "Impact of District Superintendent," p. 63.
"likableness and conformity". Persons feel judged and the supervisor does not get accurate information.

Instead, Alexander suggests a goal setting or work planning and review system.

It is a process for examining the goals the person has established for his or her work, the achievements that have been accomplished and barriers or blockages that have prevented other goals from being accomplished. Together, supervisor and person establish new goals and build plans to get around the barriers.\textsuperscript{21}

This is in keeping with McConkey's understanding that the whole reason for evaluation is to discover meaningful and constructive ways to enable the development of the co-worker. The emphasis is never on past mistakes or failures but on the possibility of improved future performance. McConkey suggests the most helpful evaluations take place quarterly, use results-oriented evaluation and concentrate on planning and reviewing objectives.\textsuperscript{22}

Similarly Peter Drucker calls for management by objectives. Every person needs to know the goals of the organization and have a clear understanding of what contributions are expected of him or her. For an organization to work, goals and objectives must be set together, with each person owning the goals and being willing to work together with others to achieve these goals. And further

\textsuperscript{21} \textit{Ibid.}, p. 68.

\textsuperscript{22} McConkey, \textit{No Nonsense}, p. 204.
each manager needs to have a clear way to measure his or her performance and results against the goals. These measurements do not need to be rigidly qualitative, nor do they need to be exact, but they do need to be clear, simple and rational - able to direct efforts where efforts need to go.

Drucker wants to give full scope to individual strength and responsibility, and at the same time give a common direction of vision and effort...management by objectives and self control.

The goal of management and the evaluative process is to enable vision, clearly defined goals and the ability to perform. Richard Yeager, in a recent survey of clergy, found that while clergy show little eagerness for evaluation, they are more open to evaluation that is centered around goals and priorities than to other possible models of evaluation.

Factor 8: Enables clergy to grow forward gifts and competencies.

The purpose of evaluation is to help persons grow forward competencies. Clergy can come to know their gifts and competencies and the kinds of settings in the church and

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the world where they can best utilize and develop their gifts and competencies. Another focus of evaluation is to help persons as they work with the church to develop a mission statement, to accomplish specific concrete goals and to grow in self-understanding. Evaluation helps persons answer these question: What is my growing edge? What gifts can I develop? In what kinds of settings are my gifts best utilized?

Certainly, as this focus makes clear, the use of reward and punishment impedes the evaluation process. Yet, a necessary part of the long-range purpose of evaluation is also to help a clergy person grow in understanding of the kinds of settings where he/she best does ministry and what kinds of skills and competencies are necessary to serve in other settings and how these skills and competencies might be nurtured forward. The clergy person, the Pastor-Parish Relations Committee and the District Superintendent struggle together to understand how and where a particular person can best utilize his/her gifts. Every clergy person needs a setting with maximum sources of positive reinforcement in order to enable expanded use of gifts and expanded awareness of gifts. Self-understanding helps a clergy person understand a change of ministry setting not as a reward or punishment but as the best available place for him or her to use and develop his or her gifts.
Factor 9: All clergy, including the District Superintendent, are participants in the evaluative process.

McConkey suggests there is another factor in effective evaluation. Evaluation should involve delegation that flows back and forth from the Pastor-Parish Relations Committee to the pastor to the District Superintendent. Effective evaluation involves continuous interaction with every level giving input to improve the process. A key component of such evaluation is that the District Superintendent shares in the process by entering into an evaluative conversation with the District Committee on the Superintendency.

Leaders lead in direct relation to the way they experience being led. The District Superintendent needs to be a participant in the same kind of evaluative process in which he/she asks pastors to share. The 1988 Discipline sets that process in motions it does for local churches and local church pastors. The District Committee on Ministries determines the missional focus of the district and can set two to four concrete measurable goals. The District Committee on Ordained Ministry members make clear what they will do to enable the achievement of these goals and the District Superintendent affirms what he/she will do to

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25 McConkey, No Nonsense, p. 204.
assist in accomplishing these goals. The District Superintendent helps the District Council on Ministries to be accountable for the achievement of the goals and the District Committee on Superintendency helps the District Superintendent be accountable for his/her tasks in accomplishing the goals. Within the District Committee on Superintendency effectiveness in achieving these goals is assessed. The functions of superintending are enumerated and the District Superintendent works with the committee to devise ways to evaluate effectiveness in at least two of these functions annually. Ways to build on strengths and to grow forward competencies are discussed. Plans for continuing education and other growth opportunities are set in motion. The Committee on the District Superintendency and Bishop can and should provide the same feedback to the Superintendent that the Pastor-Parish Relations Committee and District Superintendent offer the local church pastor. [See Appendix F]

Credibility is low if the Superintendent exempts himself or herself from the process in which he or she asks local pastors to participate.

One of the ways pastors learn is by watching the District Superintendent and Bishop do their jobs. Pastors lead their people much as they experience being led and as they experience their supervisors as being willing to be led.
Factor 10: Clear definition of tasks, ministry goals and process of supervision of necessary.

The tasks of each participant in the process must be clearly defined. There needs to be clarity about the role of the Administrative Board/Council, the Council on Ministries, the Pastor-Parish Relations Committee, the District Superintendent, the District Council on Ministries, the Committee on Superintendency and the Bishop. Confusion about roles and tasks breeds frustration, uncertainty and conflict. An awareness that God has called each person involved into ministry undergirds the process with mutual respect. Within that ministry each participant has specific tasks. The tasks are set forth clearly in the Discipline. Each group needs to know their tasks and to be aware of their group's tasks and how all these tasks are interrelated in effective ministry.

McConkey, Drucker and others stress the need to move from vague accountability to accountability that can be measured. That is obviously more difficult to do in ministry than in the manufacture of chairs or the sale of vacuum cleaners. But Kennon Callahan, church administration consultant, argues persuasively that clear ministry goals are possible. First, laity and clergy need to develop and articulate a clear, substantive vision of the mission of the church. The church and the pastor need to struggle together
until they grow a common shared vision. Then, they need to develop a few clear specific, measurable, and complementary objectives with a realistic time horizons. In Callahan's structure this evaluation includes four steps. The evaluation begins with a self-evaluation in which persons are invited to reflect on such questions as: What have I accomplished during this past year? What can I build on? What are my strengths? What do I need to change? Step Two involves consultation. The pastor shares his or her self-evaluation with a consultative team usually the Pastor-Parish Relations Committee, and then the Pastor-Parish Relations Committee shares its best evaluation of the achievements and shortcomings of the pastor. Together the pastor and Pastor-Parish Relations Committee develop a mutual agreement about what has and has not been accomplished during the past year. Then they review the church's long range plan and choose two to four key objectives as the pastor's focus for the new year. Together they also decide on one or two "competencies for that leader to grow forward" during the coming year. 26

Yeager suggests a method that also involves training congregations to do goal setting, training Pastor-Parish Relations Committees to develop ministry covenants in view

of these goals, and then empowering the pastor, Pastor-Parish Relations Committee and Board to evaluate together the quality of ministry achieved. These relationships are diagramed below.27

Relationships in the Ministry Team

WITHIN AN APPOINTMENT

PASTOR ← Consultant/Supervisor

AD. BOARD ← Consultant/Supervisor

Advocate for the Pastor

Identifies Church's Mission

P(S)PRC

AT TIME OF APPOINTMENT CHANGE

DS

PASTOR

P(S)PRC

Drucker, and McConkey urge quarterly evaluation. The models of supervision and evaluation taken from the business world assume supervision is one's primary job. As Dick Yeager from the Division of Ordained Ministry confirms, District Superintendents with their multiple responsibilities, do not "have the time or the travel budget to give to each supervisee what those approaches demand."

He, like Callahan, wants Pastor-Parish Relations Committees trained to be part of regular, probably quarterly, evaluation. The District Superintendent continues as a partner in this on-going evaluative process.

Chapter 4

Benefits of Establishing a Formal Process of Evaluation

The benefits of establishing a formal process for evaluation for clergy and churches are well documented.

Jones carried out an extensive, on-location, pilot project, working with three churches, three pastors and three Pastor-Parish Relations Committees to improve effective ministry. This involved an extended evaluation process. All three groups grew in their capacity to move beyond criticism toward working with the pastor to achieve more effective ministry. They used a slightly modified form of the evaluation in Appendix B as the basis for their discussion. Jones concluded there were at least five benefits to this evaluative process:

(1) Builds mutual trust and confidence and opens communication between pastor and people;
(2) Enables better understanding of the role of the pastor and the hopes and expectations of the congregation;
(3) Increases self-understanding of the pastor and enables him or her to set personal priorities for ministry;
(4) Informs continuing education plans; and
(5) Suggests the agenda for discussing both present and future ministry goals with the District Superintendent.29

29 Jones, "Impact of District Superintendent," pp. 75-76.
A concomitant learning for pastors in this process, is to discover the kinds of setting in the church and world where they can best utilize and grow forward their gifts and competencies.

The pastor, however, is not the only one to benefit from the evaluative process. Lay persons garner skills through participation in this process which enables them in dealing with their own lives and destinies. They, through this local church involvement, experience a form of evaluation that can be productive and useful in their business, professional and personal lives. Instead of the destructive forms of evaluation which they have known in the culture, they experience effective evaluation which builds trust, enables self-understanding and forms the basis for effective change and focused ministry.

Such learning is reminiscent of the influence of Wesley on Eighteenth Century England. In Class Meetings persons learned constructive ways to organize and exert influence and power. Constructive use of power to bring social change is one of the factors that helped avoid the same kind of blood bath in England that happened in France during the French Revolution.

The local church is similarly strengthened. Clarity about mission, purpose, goals and distinctive
characteristics and strengths enable a church's self understanding. With that knowledge the local church is able to expand decisively and add those characteristics that are important to its future. Such a church is more effective in touching the lives and destinies of people in the name of the gospel.

Such a focused, missionally directed church is also able to adapt and use the gifts of the clergy sent to them. When the church is aware of the reality of who their pastor is and which gifts he/she can grow forward, they can utilize the gifts that pastor has to strengthen those characteristics of the church which he/she is best equipped to strengthen. This utilization of gifts which are present reduces conflict and enables the church to move forward with each pastor who is assigned to them.
Chapter 5

CHARACTERISTICS OF EFFECTIVE EVALUATION

Research on the effectiveness of evaluation in business, education and the church suggests a model for evaluation within the church that has the following characteristics:

(1) Is rooted in a theological framework.

(2) Establishes a clear, measurable, specific, mutually agreed upon basis for accountability in cooperative ministry.

(3) Focuses on specific ministry goals and not on the person or personality of the minister.

(4) Works to create a secure environment where reflective self-assessment and self-initiated evaluation by both the pastor and the congregation can occur.

(5) Has clear lines of accountability with the District Superintendent asking the pastor and the local church through the Administrative Board and the Pastor-Parish Relations Committee to be mutually accountable to each other for effective mission and ministry in the local church and to be accountable to the District Superintendent for having such a process.
(6) Primary focus of evaluative process is with the mission and ministry within the local church. A judgmental focus is avoided.

(7) Enables pastors to claim their gifts and competencies and to grow these forward.

(8) Enables pastors to discover the kinds of settings in the church and the world where they can best utilize and grow forward their gifts and competencies.

(9) Equips and trains the pastor and the Pastor-Parish Relations Committee to do effective evaluation.

(10) Is an integral part of a respectful, caring, on-going supervisory process.

(11) Informs continuing education and motivates both the church and the pastor to build on strengths and to develop new habits, skills, and vision.

(12) Pastor, District Superintendent and laity are mutual participants in ministry and in an evaluative process.

(13) Equips and trains the pastor, the District Superintendent and the Pastor-Parish Relations Committee and the Committee on Superintendency to do effective evaluation.
Chapter 6

EVALUATION IN THE TEXAS CONFERENCE

In response to the 1980 Discipline mandate for evaluation, the Texas Conference Board of Ordained Ministry initiated a pilot project with the resident Bishop's qualified endorsement. [See Appendix A] Three churches in each of the twelve districts of the conference were asked to participate. Response was mixed and after the initial phase of the project the process was allowed to die. A few churches continue the process by their own initiative but most were never introduced to the process.

In 1985 with a new Bishop, Ben Oliphint, a process of the cabinet evaluating or profiling each church and pastor was initiated and continues to the present. [See Appendix C] Each January and February, Cabinet members profile each church and each pastor in their district. Some superintendents have a conference with each pastor as these profiles are prepared.30

30 In 1987 the Nacogdoches District Superintendent gave each pastor a self-evaluation worksheet. [See Appendix B] Each pastor was to complete the self-evaluation prior to his or her January consultation with the District Superintendent and to be prepared to discuss strengths and achievements in ministry, as well as areas of ministry where he or she would like to improve his or her effectiveness and skill. He or she was to set two or three goals for ministry in 1988 and relate these goals to a program of continuing education.
Profiles of all churches and pastors in each district are distributed in written form and verbally presented in a March cabinet meeting. Out of this process comes the cabinet worksheet of those pastors who need to move and those who want to move. The process provides content and new validity to the appointment process and a new cabinet awareness of the needs and strengths of both pastors and churches.

This document is an effort to move one step further in establishing a process of effective evaluation.

In 1988 the Nacogdoches District Superintendent asked each pastor to prepare a one-two page narrative assessment of his/her ministry based on Paragraph 439, Duties and Responsibilities of a Pastor, in the 1988 Discipline of the United Methodist Church. [See Appendix D] This written assessment served as the basis of a conversation between the pastor and the District Superintendent. First, the District Superintendent asked about 1988 goals. How were those goals fulfilled? What did you learn about yourself and ministry as you wrote the narrative assessment of ministry? What are your personal ministry goals for 1989? What do you want to be part of the ministry covenant with the Pastor-Parish Relations Committee and the Administrative Council? What are your continuing education plans to enable these goals and this covenant?
Chapter 7

A MODEL FOR EVALUATION IN THE NACOGDOCHES DISTRICT:
MINISTRY COVENANT
A PROCESS OF MUTUAL ACCOUNTABILITY

Using the preceding research and aware of both the characteristics of effective evaluation and the history of evaluation in the Texas Conference, a plan for evaluation of ministry in the Nacogdoches District has been developed. This plan includes careful definition of tasks, clear delineation of lines of accountability, and a reasonable timeline.
I. RELATIONSHIPS WITHIN THE MINISTRY COVENANT

WITHIN THE LOCAL CHURCH APPOINTMENT

PASTOR ← CONSULTANT → D.S.

CONSULTANT

CONSULTANT

TEACHER OF TRAINER

LOCAL CHURCH AT TIME OF APPOINTMENT CHANGE

P(S)PRC

WITHIN THE DISTRICT APPOINTMENT

DISTRICT SUPERINTENDENT

PASTOR

CONSULTANT SUPERVISE

CONSULTANT

ADVOCATES FOR THE D.S.

SUPERINTENDENCY COMMITTEE

P(S)PRC
II. Responsibilities within the Ministry Covenants

A. Responsibilities of Pastor

1. Consults with Council/Board in adopting and maintaining on-going awareness of mission statement.

2. Consults with Council/Board in framing three specific, measurable objects for the year.

3. Is responsible to District Superintendent to participate in a relationship of mutual accountability, including ministry covenant, with Pastor-Parish Relations Committee.

4. Prepares instrument to assist Pastor-Parish Relations Committee in evaluating two of the twelve ministerial function annually. [See pages 48-60 Developing and Evaluating an Effective Ministry, A Manual for Pastors. Published by General Board of Higher Education and Ministry.]

5. Serves as consultant to District Superintendent.
   a. Shares needs of local church.
   b. Shares personal ministry goals and continuing education plans.
   c. Shares self-assessment of gifts and competencies and kinds of sett
ings where he/she anticipates these gifts and competencies can be utilized and developed.

1. Frames and adopts mission statement for local church.
2. Frames and adopts three (3) specific, measurable, concrete objectives to enable this mission.
3. Presents these statements to Charge Conference.
4. Reviews these objectives quarterly.

C. Responsibilities of Pastor-Parish Relations Committee
1. Is responsible to District Superintendent and to Pastor for participating in a relationship of mutual accountability, including ministry covenant, with Pastor.
3. Participates in training for mutual accountability, ministry covenant process.
4. Serves as consultant to District Superintendent concerning needs, ministry, and mission of local church.
5. Interprets the pastor's ministry and role to the Administrative Board and congregation.


D. Responsibilities of District Superintendent

1. Consultant to the pastor.
   a. Nurtures and coaches forward mutual accountability for mission and ministry by both pastor and local church.
   b. Nurtures mutual accountability for mission and ministry of pastor and annual conference/general church.
   c. Offers emotional and spiritual support for Pastor and pastor's family.

2. Serves as consultant to Pastor-Parish Relations Committee.
   a. Trains Pastor-Parish Relations Committee in mutual accountability.
   b. Trains Pastor-Parish Relations Committee in ministry-covenant process.

3. Serves as consultant to District Committee on Superintendency. Trains District Committee on Superintendency in mutual accountability, ministry-covenant process.

4. Serves as consultant to the Bishop.
   a. Represents pastor and his/her gifts and competencies in appointive process.
b. Represents mission, ministry and needs of local church in appointive process.

E. Responsibilities of District Council on Ministries.
   1. Frames and adopts mission statement for local church.
   2. Frames and adopts three (3) specific measurable objectives to enable this mission.
   3. Presents these statements to District Conference.
   4. Reviews these objectives bi-annually.

F. Responsibilities of District Committee on Superintendency
   1. Participates in a relationship of mutual accountability, including ministry covenant, with District Superintendent.
   3. Participates in training for mutual accountability, and ministry covenant process.
   4. Interprets the District Superintendent's ministry and role to the District.
   5. Serves as consultant to the Bishop at time of appointment change, concerning needs, ministry and mission of local church.
III. PROCESS OF EVALUATION

A. Pastors trained in writing mission-ministry statement and in selecting and framing specific, concrete measurable objectives.

[Resources:
1. Kennon Callahan's *Twelve Keys to an Effective Church*.

B. Local Church Administrative Councils or Administrative Boards write a mission statement, develop three specific, concrete, measurable objectives and present these to Charge Conference. [Form Appendix E].

C. District Superintendent and District Council on Ministries write a mission statement, develop three specific, concrete, measurable objectives and share these with District Conference.

D. District Superintendent and District Committee on Superintendency write a ministry covenant. [See Appendix F]. District Committee on Superintendency meets quarterly to review covenant.
E. Pastors trained in mutual-accountability, ministry-covenant process. [Workshop, March 3 - 4, 1989. Dr. Richard Yeager, Leader].

F. Pastor-Parish Relations Committees trained in mutual support/ accountability process and in how to write a ministry covenant.


   District Superintendent introduces concept of mutual support/accountability to Pastor-Parish Relation Committee chairs.

2. Workshops on ministry covenant process led by District Superintendent in four District locations.
   a. May 4 - 7:00 P.M. - 1st UMC, Nacogdoches
   b. May 9 - 7:00 P.M. - 1st UMC, Jasper
   c. May 10 - 7:00 P.M. - 1st UMC, Livingston
   d. May 11 - 7:00 P.M. - 1st UMC Center

3. Pastors are asked to either train their own committees by May 15 or bring them to one of the four training sessions.

G. Pastors and Pastor-Parish Relations Committee's write ministry covenants. [Complete by July 15, 1989. Form see pp. 44-46]
H. Pastor-Parish Relations Committee and Pastor review and refine ministry covenant quarterly. Suggested schedule:

1. Prior to September 15, 1989: Discuss and review pastor's plans to enable church's objectives.

2. Prior to December 1, 1989: Utilize pastor-initiated evaluative instrument to discuss two functions of ministry.


4. June 1990 - Utilize pastor-initiated evaluative instrument to discuss two other functions of ministry.

I. District Superintendent meets with Pastor-Parish Relations Committees and pastors prior to Charge Conference to discuss mutual accountability: 1989, twenty-six (26) committees meet; 1990, twenty-six (26) committees meet. Content of pastor-initiated evaluative instrument not shared with District Superintendent. Pastor's personal goals that grow out of the evaluative conversation are shared with the District Superintendent.

J. A copy of the minister's covenant will be shared with District Superintendent by December 1, 1989.
K. District Superintendent meets with each pastor for an hour during January/February, 1990.

Agenda:

1. Feedback on mutual-accountability, ministry-covenant process.
2. Share 1990 personal ministry goals and continuing education plans.
3. Summarize mission ministry needs of local congregation.
4. Personal and family concerns.
5. Discuss profile [Appendix C]
6. Discuss ministry goals. What has pastor discovered about the kinds of setting in which he/she can best utilize gifts and competencies.

IV. PROPOSED MINISTRY COVENANT

A. Administrative Board/Congregation

1. Administrative Board adopts a mission statement and three concrete, specific, measurable goals for the year.
2. Administrative Board annually evaluates congregations program and ministry and quarterly reviews specific goals.
B. Pastor-Parish Relations Committee

1. Pastor shares with Pastor-Parish Relations Committee his/her plans for helping the church attain these goals adopted by the Administrative Board. List specific plans below:

2. Pastor-Parish Relations Committee-Pastor decide how Pastor-Parish Relations Committee will enable Pastor as he/she assists the church in achieving goals, i.e., continuing education, financial resources, acting as sounding board for ideas.

List specific plans below:
3. Pastor-Pastor Parish Relations Committee chooses two functions of ministry to be evaluated. Choose from the sixteen functions of ministry. [p.46]

List below:
1.
2.

4. Pastor devises instrument for evaluating these functions. Guidelines can be found pp.43 - 60 in Developing and Evaluating an Effective Ministry, A Manual for Pastors and Diaconal Ministers. 32

5. Quarterly feedback session is devised.

List schedule below:


32 Ibid, pp. 43-60.
6. A plan for recording feedback is devised.

List below:

7. Pastor decides on at least two (2) personal ministry goals and a continuing education plan partially as result of feedback.

8. Pastor Parish Relations Committee pledges support to the pastor by attending meetings, maintaining confidentiality, praying regularly for pastor, seeking adequate funds for continuing education for pastor, and interpreting pastor's role, needs and work to the congregation.
SUMMARY OF INITIAL LEARNING ABOUT THE EVALUATION PROCESS

An on-going process of clear formal evaluation enables communication between the pastor and the church. One district pastor who attended the Yeager training workshop and who had sensed little or no resistance to his leadership went home and within two weeks heard from his Pastor-Parish Relations Committee that they wanted him to move. He told his District Superintendent in a conversation, "I did not see this coming. I wish now the Pastor-Parish Relations Committee had met quarterly and we had a structure for talking. Now it is too late. The crisis is here. With earlier feedback I could have heard concerns and needs and maybe I could have responded." This is a committed pastor and he wants communication. This process can enable communication. Some crises can be avoided and new learnings, by both pastors and Pastor-Parish Relations Committees can, be enabled if there is regular discussion about implementing goals and evaluating how ministerial functions are being fulfilled. Both churches and pastors can grow forward their gifts and competencies.

First, most clergy, after dealing with the initial anxiety, were open to discussing the process. They want to be effective and they are willing to participate in a
process of evaluation if it will offer them options for working with laity to improve the quality of the ministry in the local parish. They want a handle for discussing mission and ministry with laity. Some find goal-setting a little rigid, but most were open to the idea that specific measurable objectives were a means to help persons move from talk to action. They voiced a desire for both accountability and support for themselves and for the church as they seek to be in mission and ministry.

Second, clarity of process was extremely important to all clergy. After the weekend training workshop for clergy led by Dr. Dick Yeager, the clergy requested a clear summary of the whole process. That summary can be found in Chapter 7, pp 35-47. Clarity about means of support and accountability throughout the system has power to encourage participation in the process.

Third, the person and credibility of the District Superintendent is important in this process. A basic question emerged several times: Can we trust the District Superintendent to be responsible in this process - to follow through and not to misuse data to hurt us? The Bishop and Cabinet have power to determine where a clergy person will be in ministry and there is a great fear of capriciousness.

As pastors discussed the process in the training workshop there was a high level of anxiety about the possibility of the process being misused. They feared its
use by discontented persons to make personal attacks on the person and personality of the pastor and his/her family. They, further, wanted clarification about what the District Superintendent would know in this process and how that would be used when appointments were made. Some were anxious that a thorough process was being done in one district and not required in other districts within the Annual Conference. Some just wanted to be certain that there was follow through. They expressed the frustration that they had begun several processes in the church for which there had been neither closure or careful building toward clear goals. If they invested in this process, they wanted to know the District Superintendent was invested in the process and that they could expect the process to continue for at least two years.

Fourth, in the discussion of the process, there was a concomitant unwillingness among clergy to deal with limits and where one's gifts and graces can best be utilized. One of the possible values of this process is to help clergy clarify how they may best contribute to the growth of mission and ministry as a leader of the church. Obviously, the District Superintendent and the clergy may have different perceptions. But through this process the perceptions of the District Superintendent and clergy and the perceptions of laity can be shared so that both District Superintendent
and the clergy may have a clearer vision of the settings in which the pastor's skills may best be employed.

There was a fifth learning. Evaluation can be helpful in the appointive process without removing the focus from effectiveness in mission and ministry in the local church. This author began with a resistance to the notion that this evaluation process was related to the appointment process. Because clergy seem to associate evaluation primarily with mobility within the appointive process, this author wanted to change the focus. The most important thing in ministry for the health and growth of the church and kingdom is not the mobility of pastors, although that is important to individuals and individuals do need to be treated with care and concern. What the church needs is clergy and laity committed to mission and ministry in a local church setting, supported and held accountable for effectiveness in mission and ministry in that setting. But what a clergy person learns of his/her self in this process, what a District Superintendent discovers about a clergy person's skills in this process will impact the appointment process. Honesty about this impact is essential in keeping open communication between Bishop, Cabinet and clergy. Additionally, the District Superintendent needs to be sensitive to the fact that how he/she evaluates which settings are the most appropriate places for a clergy person to grow forward their gifts and competencies has several implications: physical location,
salary range, and opportunities to advance as a leader of the church. All these factors must be faced and every pastor deserves respect, kindness and honesty.

One of the ways to stay focused on mission and ministry in the local church, rather than on whether the pastor moves or stays, is to avoid scheduling meetings of the Pastor-Parish Relations Committee during February, March and April when decisions about moves are usually made. The bulk of the evaluative work of the Pastor-Parish Relations Committee/pastor needs to fall in the late spring, summer, fall and early winter. The time table relates to how can the local church best do ministry together not to how can the local church move the pastor this June. The ultimate success of the evaluation process depends on maintaining the focus on ministry and mission in the local church.

Pastors want the District Superintendent involved in training Pastor-Parish Relations Committees in this evaluation process. This author began the process thinking that pastors would feel safer and more in control if they trained their own Pastor-Parish Relations Committee. Most pastors, however, did not want to train their own Pastor-Parish Relations Committees. They asked for a modification in the plan that had pastors as the primary trainers of the Pastor-Parish Relations Committee in the method and goal of the evaluative process. They wanted the District Superintendent to lead workshops for Pastor-Parish Relations Committees in
the process. Some felt uneasy about their ability to communicate the process. Others felt the Pastor-Parish Relations Committees would be more open to the process if the District Superintendent did the training. None seem to feel the strong need to be in charge of process and to do the training themselves that this author had anticipated. (Instead, they wanted partnership with the District Superintendent in the training process. This desire for partnership was a significant fifth learning.)

Finally, single line accountability is important. The District Superintendent can not and should not be part of the daily or even monthly ministry decisions in a local church. Certainly, neither the church nor the pastor nor the District Superintendent want this. But both the church and the pastor want to be mutually accountable to each other to do excellent, focused ministry in the local setting. And they are willingly accountable to the District Superintendent to have this plan of mutual accountability for ministry set in motion and monitored. Such a process makes supervision of clergy and churches both a possibility and a reality and makes the mutual ministry of all parties a joyful option.
APPENDIX A
Par. 427. Evaluation - Evaluation is a continuous process which must take place in a spirit of understanding, acceptance, and with a genuine desire to embody and carry forth more effectively Christ's ministry in the world lest we create defensiveness and discouragement in the church or the person being evaluated. Pastoral effectiveness shall be evaluated annually (Par. 260.d3) by the Pastor-Parish Relations Committee, district superintendent, by criteria and processes developed by the Board or Ordained Ministry and the Cabinet. The Board of Ordained Ministry and the Cabinet shall conduct an annual training program for Pastor-Parish Relations Committee members to enable them to evaluate the gifts, graces, family needs, health and readiness for ministry of the pastor (Par. 731.2 and 519.2)

INTRODUCTION
By Bishop Finis Crutchfield

"The General Conference of 1980 adopted certain professional standards and activities for the ministry among which is a procedure of ministerial evaluation, a program which has potential for good if done properly, possibilities of damage if done improperly or indifferently. Therefore, we shall endeavor to implement the matter rightly. If the evaluative process we use is abused or becomes a judgmental tool we shall alter or abandon our efforts.

In order to understand the Evaluative Program it is necessary to consider what the program is not. It is not a device that enables dissident lay persons to keep their preachers "on the hot seat," nor is it an enterprise that presumes non-professional lay people can actually judge the competence of professionally trained ministers. (So much of the ministerial function is confidential, highly personal, related to the spiritual life, as that no one can outwardly judge ministerial success but God Himself.) Furthermore, it is not a way of giving grades or negative motivation to preachers. Rather, it is largely a matter of goal setting and mutual goal achievement - pastor and laity together.

Here we have come to the heart of the matter. It is a process by which certain obvious and observable goals can be reached by Christian ministers and Christian lay-people working together in full understanding and rapport. Goal-setting should not be feared by any minister or congregation. You will note that congregational goal-setting is also included in the program since such is directly related to the effectiveness of the work of the pastor. You will note
that parish evaluation and goal setting parallels ministerial evaluation and goal-setting.

The work will be under the supervision and leadership of the district superintendents, a body of competent and professionally trained Elders in full conference connection who are already spending a great deal of their time in evaluation and goal-setting. We anticipate a good experience in our conference and will await the initiation of the program by the superintendents."

I. A TIME OF UNDERSTANDING RESPONSIBILITIES AND RELATIONSHIPS
(Three-Four months after Pastoral Appointment)

DISCIPLINE:

"Evaluation is a continuous process which must take place in a spirit of understanding, acceptance, and with a genuine desire to embody and carry forth more effectively Christ's ministry in the world lest we create defensiveness and discouragement in the church or the person being evaluated."

The purpose of this time is to enable the Pastor and PPRC to become familiar with the duties of each and become more sensitive to the supportive, encouraging aspects of ministry. It is an informal opportunity to discuss and study the respective roles of both, thereby growing in understanding of each others needs, expectations, and desires to do ministry together. It will also be a time to discuss evaluation, its limitations and possibilities.

SUBJECTS AROUND WHICH DISCUSSION MIGHT CENTER:

(1) Ministerial time requirements, (2) Duties of the Pastor recorded in Discipline (Par. 438.2) (3) PPRC responsibilities in creating a supportive, encouraging Minister-Congregation relationship, (4) Duties of the PPRC recorded in the Disciple (Par. 266.2.f), (5) Priority ministry-concerns of the laity for this local church, (6) Evaluation, its goals and limitations.

II. GOAL SETTING AND EVALUATION BY PASTOR AND PPRC

DISCIPLINE:

"Pastoral effectiveness shall be evaluated annually (Par.260.d3) by the Pastor-Parish Relations Committee, and district superintendent, by criteria and processes developed by the Board of Ordained Ministry and Cabinet."
"Pastoral effectiveness" must be evaluated within the framework of church-ministry effectiveness. Church-ministry effectiveness includes the working together of Pastor, PPRC, and the local congregation. Responsible goal setting by all of these parties, and the shared evaluations of the goals achievement will be a productive and useful exercise for a congregation. Evaluations that investigate only the weakness of the Pastor, and administered by non-professional evaluators, may do harm to our system, and ultimately complicate the reconciling and counseling roles of the district superintendent.

A. GOAL SETTING (OCTOBER-DECEMBER)

<table>
<thead>
<tr>
<th>PASTOR</th>
<th>CHARGE CONFERENCE</th>
<th>PASTOR PARISH RELATIONS COMMITTEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>records personal goals</td>
<td>adopt church goals</td>
<td>records goals</td>
</tr>
<tr>
<td>(The Pastor will list his/her personal goals in the life of the congregation related to his/her ministerial functions. These are the personal targets of achievement which may reflect areas in which he/she senses the need of progress and/or improvement.)</td>
<td></td>
<td></td>
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</tbody>
</table>

GOAL SETTING PROCESS IN ACTION

All evaluation exercises must begin with identifying the specific subject areas to be evaluated. These subject areas are goals, which are set by the Pastor, the Charge Conference, and the PPR Committee. The goals are set at the end of the year and become operative in January. Goal setting gives definition to expectations. Therefore evaluation can be centered around mutually recognized targets of achievement. The goals should be discussed and shared at a PPR Committee meeting sometime after the first of the year. The Pastor and the PPRC need to become familiar with the goals before the time of evaluation. In this way, they can be mutually supportive in goal achievement.
Pastor

1. Make ten visits in homes of my congregation every week.

2. Arrive at office by 7:00 on Mon., Wed., and Fri. for personal devotions.

3. Attend one Seminar during the year on Ministering to the grief stricken.

Seek to build a relationship with three inactive families in my congregation every 3 months.

Charge Conference (Church)

1. Create a church school class for singles.

2. Evaluate space needs within our Church School.

3. Increase our extra mile giving by 10%.

Establish a lay led system for caring for the shut-ins and older adults of our congregation.

PPRC

Become familiar with the many demands of our Pastor and the time required.

2. Survey the needs of our Parsonage home.

3. Arrange a dinner meeting with our Pastor and 3 other leaders of our church to listen to his hopes, dreams and frustrations, at least 3 times a year.

4. Interpret our congregation's needs to the Pastor.
After these goals are shared, discussed and understood, within a PPRC meeting, then "action projects" may be developed. These are specific ways in which we can help the Pastor and the PPRC meet its goals. The "action projects" related to the Charge Conference goals may be developed within the Council on Ministries, or some other program agency. However, Pastor and PPRC will have to work out their action projects together. This in itself is an exercise in supportive ministry.

SAMPLE OF "ACTION PROJECTS" FOR PASTOR AND PPRC GOALS

<table>
<thead>
<tr>
<th>Pastor Goal</th>
<th>Action Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seek to build a relationship with three inactive families in my congregation every 3 months</td>
<td>PPRC member visit a shared inactive family prior to Pastor's visit with literature and supportive word about Pastor.</td>
</tr>
</tbody>
</table>

PPRC Goal

<table>
<thead>
<tr>
<th>Action Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Become familiar with the many demands of our pastor and the time required.</td>
</tr>
</tbody>
</table>

Let the pastor & PPRC list the duties of a Pastor in a typical week, with time allotment. Then compare and discuss.

"Action projects" may or may not involve the help of the other party (Pastor or PPRC) in carrying them out. However, suggestions from either party can be most helpful in creating concrete ways a goal can be accomplished.

During the spring and summer the PPR Committee should discuss and review its goals, set "action projects" where needed to help in achieving them. This need not be the total agenda for every meeting, but this kind of review and creativity will give both Pastor and PPRC a sense of unity in ministry. Evaluations done in November will then be done in the light of questions like, "How have we helped each other achieve the goals we set?"

B. EVALUATION (ONE YEAR AFTER GOAL SETTING)
PASTOR EVALUATES:

1. The PPRC goals achievement.

2. The Congregational (Church) support in goal achievement (leadership, outreach, supportive love)

3. Pastor's personal goals achievement.

4. Pastor's leadership role in Charge Conference Goals achievement.

PPRC EVALUATES:

1. The PPRC goals achievement.

2. The Congregational (Church) support in goal achievement (Leadership, outreach, supportive love).

3. Pastor's personal goals achievement.

4. Pastor's leadership role in Charge Conference goals achievement.

3. Pastor's Personal Goals (Pastor and PPRC evaluates)

- Were the goals set by the Pastor realistic?
- In your opinion, has the Pastor accomplished a majority of the goals set?
- What are the goals that were not reached?
- Why do you think these goals were not attained?
- Can you help the Pastor identify other areas in which new goals could be set?

4. Pastor's Leadership role in the Charge Conference goals achievement (Pastor & PPRC evaluation)

Were the goals set by our Charge Conference realistic? Has the pastor served as a leader and motivator in the achievement of a majority of these goals? In what areas should the Pastor have exercised more leadership? In what ways should the appointed leaders have been more responsible? What goals have we been able to accomplish about which you feel good leadership has been given by the Pastor?

These are only sample questions. However, they reflect the flavor of the evaluation experience. This process is intended to be a sharing, supportive dialogue. Both the pastor and the Church are evaluated on the basis of goals they have individually set. Each is also evaluated on the basis of how they have helped each other achieve these goals.

DISCUSSION
EVALUATIONS GIVEN TO THE D.S. FOR REVIEW.

After the PPRC and Pastor record their responses, the information should be shared with each other. Summary evaluations may be given to the D.S. for review.

III. IMPLEMENTATION

DISCIPLINE:

"The Board of Ordained Ministry and the Cabinet shall conduct an annual training program for the Pastor-Parish Relations Committee Members to enable them to evaluate the gifts, graces, family needs, health and readiness for ministry of the pastor".

June - August (1981)

Have the materials printed in for form of a booklet.


Each D.S. will select three churches within his District for experimental use of the evaluation program. These will be churches of large, medium and small membership.

November (1982)

The evaluation process will be reviewed by the Pastor and PPRC of these experimental churches, and suggestions made to perfect the process.

December (1982)-January 1983)

The Pastor and PPRC chairperson of experimental churches, and the District Supt. will serve as a training team for all PPRC and Pastors at the District Leadership Training Seminar.

January - December (1983)

Implementation in all churches of the Texas Annual Con-
ference.
APPENDIX B
self evaluation

EVALUATIVE QUESTIONS FOR THE 14 FUNCTIONS OF MINISTRY

(As found in the 1980 Discipline)*

Please evaluate yourself. This document is for your use only. In our interview I would like for you to share with me your best sense of where you are in your ministry. Perhaps this self-evaluation will enable your thinking about your ministry. I would like for us to talk about your strengths and achievements in ministry; your cutting edge—those areas of ministry where you wish to improve your effectiveness and skill; your two or three primary goals for your ministry during 1988; and your plans for a program of continuing education.

Please rate yourself from 1 - 10 on each of items, with 10 being excellent.

I. PREACHING MINISTRY

1. Is thorough in preparation ____

2. Has sound Biblical content.____

3. Has sound theological content.____

4. Is relevant to personal needs of the congregation.____

5. Is relevant to the social needs of the community and the time. ____

6. Offers spiritual direction. ____

7. Provides a challenge to commitment.____

8. Is effectively delivered. ____

II. WORSHIP LEADING

1. Is planned as an integral unit. Hymns, prayers, sermon, all liturgy relate to the Biblical text.____

2. Uses appropriate music.____

3. Is conducted with confidence and dignity,____

4. Knows and uses the varied worship resources of the United Methodist Church.____
5. Uses variety in resources, both traditional and contemporary.


7. Is uplifting and motivating.

8. Is sensitive to human need in the special services.

III. PASTORAL CARE OR HOME VISITATION MINISTRIES

1. Responds immediately to need.

2. Calls on the sick, shut-in, and those with special problems.

3. Offers comfort and healing.

4. Listens skillfully.

5. Communicates supportive love.

6. Follows up after initial contacts.


8. Involves the laity in caring ministries.

IV. CHRISTIAN EDUCATION MINISTRIES

1. Is supportive of teachers and church school officers.

2. Is involved in training and supervising leaders.

3. Is knowledgeable and supportive of denominational teaching resources.

4. Promotes the program and growth of the church school.

5. Is open to experimentation and innovation in the Christian education ministry.

6. Is aware of and participates in goal setting for the educational ministries.

7. Keeps personally informed of activities in the church school.
V. TEACHING MINISTRIES


2. Is able to diagnose needs and help set goals for an educational experience.

3. Has skill in planning educational events.

4. Is able to present Christian concepts in understandable forms for children.

5. Is able to present Christian concepts in understandable forms for youth.

6. Is able to present Christian concepts in understandable forms for lay adults.

7. Is able to use a variety of methods for learning.

8. Is skilled in leadership training.

9. Understands the stages of faith development.

VI. WORKS WITH GROUPS IN MINISTRY

1. Initiates the formation of small groups.

2. Listens well and facilitates the expression of others.

3. Is accepting of others.


5. Involves others in decision making.

6. Allows for differences.

7. Adds a spiritual dimension to the groups life.

8. Seeks to involve every church member in at least one small groups activity.

VII. EVANGELIZING

1. Is skilled in one-to one witnessing to the Christian faith.

2. Is skilled in equipping and organizing the laity in witnessing to the Christian faith.
3. Welcomes and visits effectively new residents.

4. Is effective in preaching for commitment.

5. Is skilled in leading confirmation classes for youth.

6. Is skilled in leading confirmation experiences for adults.

7. Is knowledgeable concerning resources for evangelism.

8. Has a theology for evangelism and is skilled in methods that are appropriate to it.

VIII. CONNECTIONAL MINISTRIES (including the mission support of the denomination)

1. Is knowledgeable about the church's program.

2. Is persuasive in promoting the church's program.

3. Is able to interpret and "tailor" the denomination's program and resources to the particular local church.

4. Is effective in interpreting the mission program and opportunity of the United Methodist Church.

5. Is skilled in interpreting the social principles of the United Methodist Church.

6. Is skilled in interpreting the doctrinal statements of the United Methodist Church.

7. Assumes personal responsibility in district and conference organizations and empowers the laity of the local church to be involved in leadership roles.

8. Has a well developed theology of connectionalism.

IX. COUNSELING (functions #7 and #8 are combined)

1. Is skilled in premarital counseling.

2. Is skilled in marital and family counseling.
3. Is skilled in hospital and illness calling and counseling.

4. Is skilled in bereavement and terminal illness counseling.

5. Is skilled in listening sensitively to persons.

6. Is skilled in helping persons grow in their relationship to God in times of stress and crisis.

7. Is knowledgeable of referral services and is willing to make referrals.

8. Is open and non-judgemental in the counselling encounter.

X. COMMUNITY MINISTRIES

1. Is skilled in understanding and diagnosing community needs.

2. Is aware of community organizations and is skilled in relating to them.

3. Is willing and skilled in formulating and participating in strategies to meet community needs.

4. Has a theological foundation for involvement in community ministries and in dealing with pluralism.

5. Has skills in persuasion, conflict utilization, and intervention and change when dealing with community organizations and issues.

6. Sensitive to the poor, the suffering, and the disadvantaged.

7. Is willing to accept community responsibilities.

8. Is skilled in interpreting the social principles of the United Methodist Church.

XI. ECUMENICAL MINISTRIES

1. Is knowledgeable of the faith and practices of other denomination, particularly those who are
adjacent to the particular local church. ____

2. Is sensitive and supportive of the integrity and work of other denominations. ____

3. Is skilled in communicating objectively and effectively the attitude and positions taken by other denominations. ____

4. Has an adequate theology of pluralism and ecumenism. ____

5. Is willing and effective in participating in ecumenical programs. ____

6. Is in sympathy with and effectively interprets the ecumenical stance of the United Methodist Church. ____

7. Is effective in ecumenical encounters in interpreting and representing United Methodist theology and practices. ____

XII. MANAGEMENT SKILLS (functions 312 and 13 are combined)

1. Is skilled in enabling a group to establish goals. ____

2. Knows the external conditions facing the church.____

3. Is skilled in enabling a group to develop plans. ____

4. Is skillful in conflict utilization and decision making. ____

5. Has effective team building and interpersonal relation skills. ____

6. Is imaginative in solving problems. ____

7. Is skilled in enabling a group to evaluate performance and leadership.____

8. Is skilled in volunteer personnel management; at the points of recruiting, training, and supporting. ____

XIII ADMINISTRATION MINISTRIES

1. Attends to details. ____
2. Provides clear organized agendas.
3. Uses time effectively of self and others.
4. Is able to delegate effectively work and responsibilities to others.
5. Provides clear directions for others.
6. Keeps adequate and neat records.
7. Is punctual and attentive to appointments.
8. Is effective in managing the internal communication network within the congregation.
9. Is effective in external communication beyond the local church; i.e. letter writing, public speaking, and newsletters.

XIV. PERSONAL SPIRITUAL GROWTH
1. Is disciplined in personal prayer and Bible study.
2. Reads widely in theology, Biblical studies, periodical and fiction.

*Adapted from an Evaluative Instrument published, 1980, Division of Ordained Ministry, United Methodist Church.
### TEXAS CONFERENCE

#### ANNUAL PROFILE OF CHURCHES

**PROFILE UPDATE:** 1989

<table>
<thead>
<tr>
<th>Church/Charge</th>
<th>PPSC Chpn</th>
<th>Pastor</th>
<th>Spouse</th>
<th>Church Phone</th>
<th>Home Phone</th>
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No. in family | Years served | Pastor's Age | living at home | in present appt. | Other |
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<tr>
<th>Conference Relationship</th>
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**Housing**

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**PROFILE OF CHURCH** (ES) - Signs of growth/concerns/hopes:

**PROFILE OF PASTORAL LEADERSHIP** - Accomplishments/concerns/hopes:

**PRELIMINARY RECOMMENDATION:** (R)(E/R)(E)(E/M)(M)(O)
APPENDIX D
ASSESSMENT OF MINISTRY

Please prepare a one-two page narrative assessment of your ministry and bring it with you to our interview. Paragraph 439 in the 1988 Discipline outlines the responsibilities and duties of a pastor. Use that paragraph as the basis for your self-assessment. When you have concluded your assessment, please indicate what kind of continuing education you think would be most helpful for you in 1989. Thanks! I look forward to hearing about your ministry.
APPENDIX E
APPENDIX E

TURN IN TO CHARGE CONFERENCE

GOALS FOR 1989

The discipline asks that the administrative board or council set goals for the congregation each year. These goals are to be shared with the charge conference and the district superintendent.

MISSION STATEMENT: (Write a three to four sentence missional statement for your church. Why are you here? What is God calling you to do as a community of faith? What people do you seek to serve?)

GOALS: (List three specific, concrete, measurable goals which your board or council has adopted for 1989.

1.

2.

3.
APPENDIX F
APPENDIX F

DISTRICT SUPERINTENDEND/DISTRICT COMMITTEE
ON MINISTRY COVENANT

I. 1989 District Council on Ministry Goals

A. To initiate and carry out a process for evaluating the ministry of clergy and laity within the district during 1989.

B. To empower lay leadership through one skill-building event and one spiritual growth event in 1989.

C. To strengthen the convenantal community among pastors through a district retreat and two other events in 1989.

D. To enable the development of Hispanic ministry in the Nacogdoches District during 1989.

II. District Superintendent's plan to assist in achieving District goals.

A. To achieve first goal.

1. I will clearly outline the assessment process.
2. I will have a training in evaluation process workshop for pastors.
3. I will be available to assist pastors in training Pastor-Parish Relations Committees. There will be four workshops in May.
4. I will follow-up this evaluation process by asking for a report on the Board's Ministry Covenant at each Charge Conference and by requesting a report on the ministry covenant process from each Pastor-Parish Relations Committee chair by December 1, 1989.

B. To achieve the second goal.

1. I will work with the committee on lay speaking to develop a lay speakers' training in October/November 1989.
2. I will work with the District Committee On Ministries to develop a spiritual growth event for laity in the fall of 1989 or Lent 1990.
C. To achieve the third goal.

1. I will plan with the district retreat committee a February/March clergy retreat.
2. I will serve communion at two clergy gatherings during 1989.
3. I will plan two opportunities each year for clergy and their families to share in a social setting.

D. To achieve the fourth goal.

1. I will work with the New Church Committee to develop a plan for Hispanic Ministry.
2. I will work with laity and the District Missions Committee to develop the Visionaries Club.
3. I will work with the Bishop, the Board of Global Missions and Hispanic pastors to secure pastoral leadership for the Hispanic ministry.

III. Personal Ministry Goals

A. To maintain a daily discipline of journaling, Bible study and prayer.
B. To complete at least one course in my Doctor of Ministry of Ministry program.
C. To create enough space and resources to strengthen my personal life.

IV. District Committee On Superintendency will evaluate the supervision function and the pastoral function of superintending using the instrument found on pp. I-4 and I-5, Developing and Evaluating an Effective Ministry: An Idea Book for District Superintendency Committees.

A. The Committee will meet quarterly.
## EVALUATIVE STATEMENTS

<table>
<thead>
<tr>
<th>EVALUATIVE STATEMENT</th>
<th>BEHAVIOR INDICATORS</th>
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<tbody>
<tr>
<td>1. Understands the characteristics and goals of local churches.</td>
<td>not at all barely partially extensively</td>
</tr>
<tr>
<td>2. Intervenes with pastors and congregations to determine how their goals are representing the larger goals of the connection.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>3. Shares the goals of the conference and their implications for the local church.</td>
<td>not at all barely partially extensively</td>
</tr>
<tr>
<td>4. Provides training and support for the evaluation between the pastor and the P(S)PRC.</td>
<td>not at all barely partially extensively</td>
</tr>
<tr>
<td>5. Seeks to know the individual gifts and potential of pastors.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>6. Evaluates pastors.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>7. Provides counsel and support for the pastor's continuing education program and needs.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>8. Is effective in resolving differences that arise within the church.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>9. Is accessible to pastors.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>10. Is accessible to the P(S)PRC.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>11. Is available to pastors for reflecting theologically on their ministry.</td>
<td>not at all barely partially extensively</td>
</tr>
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</table>

12.

Comments:
### EVALUATIVE STATEMENTS

<table>
<thead>
<tr>
<th>EVALUATIVE STATEMENTS</th>
<th>BEHAVIOR INDICATORS</th>
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<tbody>
<tr>
<td>1. Communicates a personal Christian witness and provides spiritual leadership for those who look to him/her for it.</td>
<td>not at all barely partially extensively</td>
</tr>
<tr>
<td>2. Provides pastoral care for the clergy and their families.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>3. Responds sensitively to conditions in the churches and the parsonages.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>4. Encourages the development of clergy peer groups for mutual support and discipline.</td>
<td>not at all barely partially extensively</td>
</tr>
<tr>
<td>5. Listens and responds to the needs of pastors and their families.</td>
<td>not at all barely partially extensively</td>
</tr>
<tr>
<td>6. Is approachable and the pastors feel comfortable when coming to the superintendent with a personal problem.</td>
<td>never rarely frequently regularly</td>
</tr>
<tr>
<td>7. Is viewed by district pastors as their pastor as well as supervising authority.</td>
<td>never rarely frequently regularly</td>
</tr>
</tbody>
</table>

### Comments:

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I-5
Bibliography


**Pamphlets**


**Journals**


Unpublished Materials

