

Evaluation of Pastors and Program Staff Members

by Gerry Tyer

Purposes for Evaluation

Evaluation should develop the skills and competencies of the person being evaluated, and to develop the capacity for self-evaluation and self-development. Every job has expected professional or *functional skills* (teaching, preaching, counseling, program development) and *competencies* (leadership, interpersonal, managerial/administrative, technical and contextual). People who master a job are known not only for their expertise, but also for their “on board” ability to improve continually.

Therefore, the best form of evaluation emphasizes skill and competency development *as well as* the ability for self-development. For additional copies of this paper, or for assistance implementing this process of evaluation, call Gerry Tyer at (727) 821-0666.

Top-Down Evaluation

Top-down (or outside-in) evaluation is a common form of evaluation. Teachers give grades to students. Supervisors assess employees. Personnel committees critique the performance of staff members.

The theory supporting this form of evaluation claims it insures compliance with the expectations of the organization, measures success or failure, and helps determine rewards or punishment for results. In fact, top-down evaluation fails to help develop expertise and fails to encourage self-development. It tends to create passive dependency, resentment, and bitterness. It discourages growth from within. It encourages anxiety, resistance, and discord.

Self-Development Model

A consultative, self-development model, on the other hand, combines inward reflection and feedback from others. Honest self-evaluation balances the impulse to think too highly or lowly of ourselves. Genuine self-evaluation is like using a good mirror. It's easier to comb our hair with a good mirror. A distorted mirror (or no mirror at all) makes self-improvement difficult.

Consultation provides helpful, constructive feedback. Self-evaluation alone may result in the choice of a distorted mirror. Consultation helps select an accurate mirror. Consultation comes from trusted mentors who know the person *and* situation well, who care for both the person *and* the situation, and who have the gift of coaching.

Personnel Policies and Job Descriptions

Personnel policies usually address a wide range of issues including compensation, benefits, training, hiring, termination, standards of performance, personnel records, sexual harassment, employee classifications, as well as evaluation procedures. Usually evaluation is linked to a specified period of time (end of year, salary review time, or the beginning of the program year, etc.)

Written job descriptions and policies help avoid difficulties arising from unspoken expectations, hidden assumptions, and unexpressed priorities. Job descriptions usually indicate the routine work which is expected, but they should also specify the authority given to the position.

Role of the Personnel Committee

The self-development process described above frees Personnel Committees from directly conducting evaluations. Instead, the committee insures the evaluation process is well in place and monitors its effectiveness. The committee also focuses on other issues, such as: long range and future staffing needs; equitable and reasonable personnel policies; salary recommendations; staff continuance recommendations; and communication with others who have an interest in the work of the staff member.

Annual Review Procedure

The review can begin at any time during a year. The following is organized around a January-to-December fiscal year.

During November, the staff member will:

- 1) Reflect upon the prompting of the Holy Spirit by drawing upon prayer, bible study, and consultation with members and leaders of the church in order to discover God's will for the coming year.
- 2) Review the church's mission statement, key objectives for the coming year and the position description. Think through the essential accomplishments needed to be attained during the next year.
- 3) Choose two to four key objectives which relate to the *functional skills* required by the position. They should be written, specific, measurable, and include realistic time horizons. They should be concrete, achievable, and mutually reinforcing.
- 4) Select two to four specific leadership, interpersonal, managerial/administrative, professional and contextual *competencies* which should be developed during the coming year. These should be directly related to the skill objectives.
- 5) Identify three to six areas from the skill and competency objectives which could be helped by the resource of a mentor/consultation/coaching team.
- 6) Submit to the Personnel Committee for approval the makeup of a three to six member coaching team. These persons may be from within or beyond the church, depending upon the areas selected in Step 5. Each coach or mentor should be recruited because of their helpfulness in the areas selected, and they should have the gift of coaching. Avoid people who will only give praise or only criticize. Choose persons of integrity, credibility, and trustworthiness.
- 7) Recruit the coaching team and share with them the skill and competency objectives tentatively planned (Steps 3 and 4). Receive feedback concerning the scope and appropriateness of the objectives.
- 8) Gather (with the help of the coaching team) the resources needed to help accomplish the plan. Identify appropriate continuing education opportunities which will advance the plan.
- 9) Submit for the approval of the Personnel Committee the final version of the skill and competency

objectives planned for the coming year. Include interim benchmarks or milestones during the year which will indicate the progress completed. Also, submit for approval of the Personnel Committee the specific continuing education events planned and other resources needed for success.

During January through September:

10) Meet at least quarterly with the coaches (individually or as a group) in order to assess progress and make mid-course corrections.

11) Gather feedback from church leaders (committee chairs, etc.) in order to assess progress toward accomplishment of the skill and competency objectives.

During October:

12) Prepare a written self-evaluation including:

- A statement of the results of the objectives.
- An assessment of the strengths and weaknesses of the results.
- A list of insights and discoveries made concerning each objective.
- An assessment of the progress made on the competencies.
- A preliminary proposal for skill and competency objectives for the next year.

13) Share the written self-evaluation with the coaching team, including background and rationale, implications and feelings, and new insights. The purpose of this meeting should be to advance, grow, build and develop performance – not to hurt, criticize and correct. Nor should it simply praise, protect, give advice, or evaluate (in a top-down sense).

14) Rewrite the self-evaluation based upon the feedback of the coaching team.

15) Meet with the Personnel Committee in order to report the successful completion of the evaluation process, share a copy of the final written version of the self-evaluation, receive feedback from key leaders and discuss salary recommendations for the next year.

16) Return to Step 1 and begin a new year of self-development.

Sample Letter Requesting Feedback

Date: Three weeks before Step 15 above.

To: Key leaders who have worked with the staff member during the past year.

From: Personnel Committee

Each year the Personnel Committee conducts a review of the staff. Your help would be greatly appreciated. Please answer the questions on the attached form. A synopsis of the survey results will be prepared by the Personnel Committee and shared with the staff member. Confidentiality of individual respondents will be carefully guarded. (Please see *Note Concerning Confidentiality* at the end of the enclosed form.)

You are a crucial part of this process. We need the feedback of people who have worked with our staff. In addition to the form, we encourage any written comments you would like to make. We are also always available if you wish to address Personnel Committee members in person. The review of the staff would not be complete without your input.

Please return your form to the Personnel Committee Chairperson, in the enclosed self-addressed envelop by October 1 . Thank you in advance for your assistance.

Sincerely,

The Personnel Committee

Performance Review Form For _____

1) Your Name: _____

2) During the past year, my association with this staff member has been:

3) I have had " substantial experience to observe this person's performance.

" some experience

" little experience

" no experience

4) What are the strengths you would like to commend in this staff person?

a)

b)

c)

5) What are the areas which need improvement?

a)

b)

c)

6) The position description of this staff member includes (but is not limited to) the following items. Please check the appropriate ranking of this staff member in these tasks:

	Very Effective	Somewhat Effective	Not Effective	Don't Know
a) _____	"	"	"	"
b) _____	"	"	"	"
c) _____	"	"	"	"
d) _____	"	"	"	"
e) _____	"	"	"	"
f) _____	"	"	"	"
g) _____	"	"	"	"
h) _____	"	"	"	"
i) _____	"	"	"	"
j) _____	"	"	"	"

7) Please make any other comments you wish to convey to the Personnel Committee.

Note Concerning Confidentiality:

Your individual survey will be shared with this staff member **only** if both of the following conditions have been met:

- A) You have checked this box: " and
- B) This staff member has asked to see the individual responses.

Please return this form to the Personnel Committee Chairperson.