

The Free Methodist Church in Canada
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MEMORANDUM

To: Delegate
From: Susan DePlanché – Credentialing Coordinator
Re: Pastor’s Performance Appraisal

It is time for the annual pastor’s Performance Appraisal to be arranged and I am sending this memo to you to help you work carefully through this very important exercise in the ongoing development of the leadership effectiveness of your pastor. These materials have been developed from similar materials used to help the Ministry Centre team continue to develop effectiveness. We are indebted to Brian Marchant of Northeast 45 for his consulting and coaching in the development of these tools.

At the outset, it is to be kept in mind that this is to be a time for “speaking truth in love” (Ephesians 4:15) so that your pastor is both affirmed in the areas in which s/he is ministering with excellence and given helpful coaching in the areas where s/he needs to grow in leadership skills.

As the church’s delegate, you are the link between your congregation and the conference. The Leadership Development department of The Free Methodist Church in Canada depends on you to oversee this process until it is completed. This does not mean that you have to do each part, but you must ensure that each is done. Of course, my office is available to give you coaching if some steps in this process are not clear to you.

May the Lord Jesus bless you in your ministry of leadership in your local church as you work with us to help your pastor keep growing in his/her ministry effectiveness.

Please follow the following steps carefully.

Step 1: Preparation of the Performance Appraisal Form (see Form 1)

1. Customize the Performance Appraisal Form introduction (pp.1-4) to your local church situation, with the name of your pastor. As you work your way through each page, you will see that the places where local church information needs to be inserted is highlighted in blue in the document.
2. Customize the Performance Appraisal Form evaluation section (pp.5-11). To complete this step, you will need a copy of your pastor’s job description. The Performance Appraisal is based on the 3 sections found in your pastor’s job description. If a point form format was used in the job description, you will need to create short statements for the evaluators to score.

The first section will contain sentences based on the “**standards of performance**” and the “**key activities**” of the “**major responsibilities.**” Insert the major responsibilities into the headings of

this section and then within each section, insert descriptive statements or questions for each of the standards of performance and the key activities that relate to each major category. (Please limit the number of statements or questions in this section to a maximum of 15.)

The second section relates to the “**core competencies**” in your pastor’s job description. Insert the competencies into the Performance Appraisal as they appear in your pastor’s job description. The heading will identify a competency; the statement will define that competency. These definitions can be sent by my office if you do not have them in the job description. (Please limit the number of competency questions to a maximum of 5.)

The third section relates to your church’s “**congregational values**”. Insert the values into the Performance Appraisal as they appear in your pastor’s job description. The heading will identify a value; the statement will be the definition of that value. (Please limit the number of questions to a maximum of 5.)

After each statement, for all sections, there are several lines for comments.

Step 2: Creating the 360° Performance Appraisal Team (see Form 2)

The 360° Performance Appraisal approach is designed to have the performance of the pastor evaluated from a variety of points of view. This is not to be done by the official board (though the board is represented on the team), but by a team of discerning individuals of no more than 9 people selected by the pastor and official board for this task. The pastor is to be one of the team members and will submit an evaluation of him/herself. A delegate’s memo (Form 2) is provided for you to use to invite the pastor to propose names to you for the official board to consider when they are electing the 360 team members in addition to the first five members (below) who serve according to their positions.

1. It is suggested that the following people be selected for the team:
 - a. Pastor
 - b. One (or two) paid or unpaid ministry/office staff members
 - c. One key ministry leader (unpaid, non-board member, lay person)
 - d. Delegate
 - e. Chair of the Board
 - f. A person who is a member but new (within the past 12-24 months) to the ministry of the church
 - g. Optional: Up to 2 additional team members may be added.
2. As the delegate you need to ensure that the Performance Appraisal forms (prepared in Step 1) are distributed to these Performance Appraisal team members once they have been selected and have agreed to participate in this exercise. It may be advisable to brief them as a group, review the instructions together and answer questions. The actual appraisals should not be filled out in a group setting so that evaluators do not influence one another.

Step 3: Collation of the Performance Appraisal Scores (see Form 3, Form 4)

1. As the delegate, it is your responsibility to ensure that these scores are collated according to the following instructions. You can do this yourself or you can ask another trusted individual to do this task for you. It must be emphasized that this is information that is confidential to the pastor and the delegate or his designate.
2. In Form 3, you are being provided with an Excel file that will automatically generate a Performance Appraisal summary report of the average scores of each question in the questionnaires. Please follow the instructions as they appear in Form 3.

If you do not have access to an Excel program, a chart is also being provided in a Word document for you to use on a computer or to print off and use manually. Average numbers only; N/As don't count.

Please record all the comments that the evaluators make on the Comments Form provided in Form 4.

3. Finally, the overall average (the average of all the average scores) needs to be calculated. If the overall average score is lower than 5.5, this indicates a need for a MEGaP consultation. As delegate, you need to immediately contact the Bishop, or Credentialing Coordinator and inform him/her of these results of the performance appraisal to receive coaching on how to proceed with sharing these results with the pastor before proceeding to step 4.

Step 4: The Performance Appraisal Results Review Session (see Form 5)

The results of the Performance Appraisal exercise are to be shared with the pastor in a confidential meeting with the delegate. The delegate and pastor go through the complete results of the Performance Appraisal together first, and then decide between the two of them which parts (or all) of the Performance Appraisal results to share with the Board. If the delegate and the pastor disagree about which parts to share, they should seek counsel (i.e. a wise person in their local church, the Director of Leadership Development & Church Health, the Credentialing Coordinator, etc.) until they both agree. The Credentialing Coordinator is available to give coaching to a delegate by telephone.

1. It is the responsibility of the delegate to arrange for the session. If coaching is required, Forms 3 and 4 will need to be sent to the Credentialing Coordinator in advance.
2. After the session has been completed, as delegate, you need to complete and send the attached Form 5 to the office of the Credentialing Coordinator, indicating that the Performance Appraisal has been completed, what counsel was given to the pastor, what adjustments to the Job Description (if any) are going to be recommended to the Official Board, what goals were set for the future as a result of the review session, what Continuing Education Units (CEUs) have been completed in the past year and whether a plan is in place for the coming year. This will be placed in your pastor's personnel file, so it needs to be completed with care.

Thank you in Jesus' name for giving leadership to this important work.