

D. 2. A SUGGESTED APPROACH FOR PASTORAL REVIEWS

This document is designed to assist congregations in the process of undertaking pastoral reviews. It consists of three parts.

- *Part 1 (pp. 1-4) offers some foundational understandings related to pastoral reviews.*
- *Part 2a (pp.5-8) offers a suggested process that can be used by congregations who renew pastoral terms with a vote every 3-5 years.*
- *Part 2b (pp. 9-11) offers a suggested process that can be used when congregations move to using open-ended pastoral terms.*

PART 1 – FOUNDATIONAL UNDERSTANDINGS re: Pastoral Reviews

A. ASSUMPTIONS

1. Terminology

- The concept of review must be accepted in the broadest meaning of the word.
- Review means providing ministry assessment, measuring short and long term goals, giving and receiving feedback, providing counsel, and honoring reciprocating accountabilities between all involved.
- To avoid possible misunderstanding related to the various terms that are sometimes used (evaluation, assessment, review), this document will use the term “review” throughout to refer to the suggested process.

2. Reviews can be positive and fruitful

- Reviews, both formative and summative, are inevitable, natural and always present. All people, especially those in leadership, are reviewed on a regular basis.
- How these reviews are conducted and managed is critical. Reviews must be structured in responsible, scheduled ways; otherwise surprises and irresponsible coups can destroy a congregation and its leaders.
- Reviews produce anxiety for pastors and their families, the reviewers and the congregation.
- Poorly structured and administered reviews can destroy a pastor, his/her family and the congregation.
- Well-done reviews can inspire confidence and unity within the Church, and can enhance the pastor’s ministry and the congregation’s mission. Even difficult issues can become the essence of nurture and growth.

3. Pastoral reviews are unique

- The nature of pastoral call makes a pastoral appointment different from other employment situations. A pastor is called by God and affirmed by and accountable to the congregation. This does not mean that clear employment practices are not necessary, but it needs to influence the spirit in which they are administered. This also reinforces the importance of agreed upon processes before the start of a review.
- Specific care must be taken to avoid incorporating a pastor's private life and especially that of his/her family into the review.

B. PURPOSE/GOAL OF PASTORAL REVIEWS

1. Goals of a Review

- To facilitate growth toward more effective ministry for the pastor and the congregation. (A concurrent congregational review is essential for mutual success of this process.)
- To affirm areas of effectiveness and success in ministry.
- To affirm and encourage growth in personal, professional and congregational relationships and ministries.
- To identify areas of concern and/or tension – where nurture and growth are needed.
- To help us live out the teaching of Ephesians 4:13, where Paul states that we are to grow in ministry, assist each other in growing toward maturity of faith and grow up into the fullness of the stature of Christ.

2. Implications of “facilitating growth toward more effective ministry”:

- The word “review” by definition implies focusing on the past; doing so offers perspective and guidance. However, if the goal is to move toward more effective ministry, the process should also be oriented to the present and the future.
- With this in mind, an annual process of self-assessment and goal setting is vital.
- The most effective way for growth to happen is via affirmation.
- Change does not come quickly or easily. Change may be expected but it requires time and mutual assistance. “Quick fixes” in areas of concerns and tensions are not realistic.
- Pastoral reviews should not to be used to solve conflicts. Instead, reviews tend to magnify “what is”, whether health or conflict. If significant issues, tensions or conflicts are present between the congregation and the pastor, they should be addressed separately and prior to any summative review leading to a term renewal and/or a termination.
- Affirmation following evidence of growth and change is the most encouraging experience for a pastor and for a congregation.

C. WHO SHOULD BE RESPONSIBLE FOR PASTORAL REVIEWS?

1. It is recommended that each congregation has a Pastor Congregation Relations Committee and that pastoral reviews are part of this committee's responsibilities.

- Job descriptions for a PCRC as well as many helpful resources for their work are available in the area Conference Minister's office. They can also be found at the following websites:
http://www.mennoniteusa.org/executive/ministerial_leadership/docs/4_pastor_congregation_relations.htm
<http://www.mennonitechurch.ca/resourcecentre/ResourceView/23/7803>
- Some congregations may have another name for this committee (eg. Personnel Committee, Reference Group) but whatever the name, the tasks need to be similar.
- This committee needs to be a standing committee, accountable to the Church Council. Their responsibility is too large to add it to persons who already have other assigned responsibilities. (For example, the Church Council executive or Deacons should not add this to their load.)
- This committee's primary concern should be the relationship between the pastor(s) and the congregation. (An additional goal in a multiple staff setting is the relationship between pastors. The PCR committee can make recommendations to Church Council regarding working conditions, salaries and benefits, but final decisions regarding these matters belong to the Church Council.)
- The committee is responsible to share with Church Council the results of the reviews.
- A committee of 4-5 would be recommended. Half or more should be elected by the membership; others might be appointed to bring balance and insure necessary gifts.
- The chair of this committee should be a full member of Church Council.
- Terms for each member should be at least 3 years and term endings should be arranged to insure continuity of experience.

2. Essential PCRC Member Gifts

Essential gifts for those serving on the PCRC include:

- The ability to listen well, to assess and summarize congregational input, and to write or share evaluative directions.
- A supportive and encouraging spirit.
- The ability to practice openly speaking the truth in love.
- The understanding that their task may require making difficult decisions.

D. PREREQUISITES/FOUNDATIONS FOR A GOOD REVIEW PROCESS

1. The congregation needs goals that are reviewed annually by elected leadership and from time to time by the congregation.

- With this, a congregation defines a clear sense of mission, short and long range goals and current strategies to achieve its goals.

- With this, a congregation knows what kind of leadership is needed and desired from its pastor.
 - With this, a congregation has a sound basis for reviewing a pastor's performance.
- 2. The pastor's review must be based on the pastor's job description and goals prepared jointly by the pastor and leadership.**
- The pastor may not be reviewed for aspects of church life that are not part of his/her job description.
 - The pastor's family – already living in a “fish bowl” – must be protected from inappropriate inclusion in the reviews.
- 3. The clear understanding that Christian communities act in Christian ways.**
- Points of stress or weakness can and should be identified but the goal is always to encourage growth. “We are to speak the truth in love”.
 - Congregational members are accountable for what they say. Respondents should be encouraged to sign their names. This promotes a level of honesty, integrity and accountability that is consistent with our theology.
 - It may be helpful for those leading the review to know the identity of respondents if clarification or further dialogue is required.
 - While the person being reviewed should receive a full report, s/he should not see the original responses or be able to identify who said what.
- 4. Consult with the Conference Minister to request a Review Consultant.**
- Personnel reviews are among the most difficult responsibilities congregations and their lay leadership face.
 - The Conference Minister is willing to discuss with you the purpose and goals of the review you are planning to undertake, and to assign a trained review consultant who would be willing to assist you.
 - S/he (or the assigned consultant) is also willing to offer sample review tools.

PART 2A
SUGGESTED PASTORAL REVIEW PROCESS FOR CONGREGATIONS
THAT USE A VOTE FOR PASTORAL RENEWALS

(Congregations that have chosen “vote free” open-ended terms for pastors should refer to part 2b, pp 7-9.)

Preamble: This review plan suggests a process that includes smaller annual reviews and a more major review every 3-5 years. The Pastor Congregation Relations Committee (or another designated review group) should conduct the annual reviews and would also take responsibility for the major reviews. The major review would be planned in rhythm with the end of term vote (it should preferably be completed at least six months before the vote takes place).

Purpose: The purpose of the pastor/congregation review is to affirm and strengthen the pastor and congregation in their relationship and ministry. While points of stress or weakness may be identified alongside strengths and affirmations, the goal should always be to find ways to seek growth in personal, professional and congregational relationships.

Process for the Annual Review

Step 1 – Pastor’s Preparation

The pastor prepares a written “self-assessment” that is to be submitted to the designated review group at least two weeks prior to a planned review meeting (see next step). This report should:

- Review areas of responsibility as outlined in the written job description.
- Report on successes in ministry.
- Report on growth areas, problems or concerns encountered in ministry.
- Share a statement of goals and vision for ministry for the coming year.
- Identify areas or questions on which the pastor would especially welcome feedback from the committee/congregation.

Step 2 – Review Group’s Preparation

The review group members individually prepare themselves for the review meeting by:

- Reviewing the pastor’s memo of understanding and job description.
- Reading and reflecting on the pastor’s self-assessment.
- Summarizing what they see as the pastor’s areas of particular strengths and areas where growth is needed, based on their own experience and their pulse of the congregation.

Step 3 – Review Meeting

The designated review group meets with the pastor. This meeting will include:

- An opportunity to ask questions about and to respond to the pastor’s self-assessment.
- Feedback to the pastor on his/her job performance. This will be based both on the pastor’s self-assessment and on the review group’s reading / “pulse” of the congregation.
- A review of the pastor’s job description, memo of understanding and goals for the coming year.

Step 4 – Summary Report

The review group writes a report summarizing the conclusions of the Review Meeting. This report should be saved in a confidential personnel file. A copy should be given to the pastor, to the Church Council and to the area Conference Minister.

Issues Needing Clarification Before Beginning A Major Review

- What do you want to learn in the process of a pastoral review? – Will the process involve only a review of the pastor or also include the congregation and its life and ministry, including structure, program, facilities, mission and goals? We encourage a review of both the pastor and the congregation. If more than one pastor is involved, all could be reviewed at the same time, to prevent congregations from experiencing “review fatigue”.
- Leadership for the review process. – We encourage contacting the area Conference Minister before the process is begun. S/he may recommend engaging an outside resource person (a trained review consultant) to guide the review process and offer possible persons to fill such a role.
- While the review is the responsibility of the designated review group, the pastor should be given the opportunity to offer ideas and share concerns regarding the process that is chosen.
- Relationship of the review to the extension of the pastor’s term. – It is suggested that a major review be completed at least six months before a pastor’s renewal vote. (For congregations with more than one pastor, this may not be possible, especially in settings where all the pastors are reviewed at the same time.)
- A regular review schedule is important. – It is most helpful if the schedule for the review can be on a regular basis and agreed upon at the beginning of a term so as to avoid surprises and minimize suspicions.
- Should written responses/questionnaires be signed? – Though persons may be freer to express themselves anonymously, experience is showing that signed questionnaires are most helpful in the review process. While the actual responses should not be seen or identified by the person(s) being reviewed, it is helpful for those leading the review to know the identity of the respondents. Persons expressing themselves in this way should be held accountable for what is written by the request of a signature. Unsigned forms should not be included in any review report.

Process for a Major Review (every 3-5 years)

Step 1 – The review committee meets with a review consultant. (These are individuals with personnel experience who have received training for this task. You can arrange for a consultant by calling an area Conference Minister.) Together the review consultant and the committee can outline the review process and discern appropriate instruments for data gathering.

Step 2 – The pastor prepares a written “self-assessment” which includes a review of areas of responsibility and activities of the past 3-5 years.

- A review of areas of responsibility and activities for the past 3-5 years.
- A report on successes that have been experienced during this time. What has gone well?
- A report on growth areas, problems or concerns encountered in ministry during this time.
- A statement of goals for ministry for the next 3-5 years.
- Any requested changes in job description, memo of understanding, and use of resources for the next 3-5 years.
- Identification of questions on which the pastor would especially welcome feedback from the committee/congregation.

Step 3 – The committee meets with the pastor (and spouse, if desired by pastor and spouse) to review the pastor’s report and hear suggestions or questions they may have.

Step 4 – The review committee solicits responses (written forms or another method) from persons within the congregation. The questionnaire and respondent group will vary according to what you want to learn. Some congregations involve the entire membership; others include a representative, randomly chosen group. The pastor should be given an opportunity to suggest questions or to express concerns about the questions that will be asked. The questionnaire should reflect both the pastor’s job description and information received from the pastor’s written report. The area Conference Minister or the Review Consultant is available for consultation in the formation of the questionnaire and can also provide some samples.

Step 5 – In conversation with the review consultant, the review committee tabulates the results of the questionnaire and prepares a summary and an interpretation of the results.

Step 6 – The committee meets with the pastor (and spouse, if desired). The pastor may invite a support person other than his/her spouse to sit in on the meeting. The meeting will:

- Again review the pastor’s written report.
- Share a summary and interpretation of the questionnaire.
- Invite the pastor’s (and spouse’s) response to the summary.
- Clarify any questions and provide feedback and counsel for the pastor.
- The counsel and feedback should include the recommendation that the committee will be bringing to the Church Council. The options might include:
 1. That the pastor is recommended for another term; everything is satisfactory.
 2. That the pastor is recommended for another term, accompanied with a suggestion that improvement (strengthening of gifts, increase of skills) be sought in a given area of work (eg. that a greater amount of time be devoted to pastoral care).
 3. That the pastor is recommended for another term, on the condition that specific steps be taken in reference to a given aspect of ministry (eg. that he/she enroll in a course on grief counseling or preaching) within the next six months.
 4. That on the basis of the committee’s work and discernment the conclusion reached is that congregational needs and priorities do not intersect sufficiently with the pastor’s gifts, interests and priorities. Consequently, the committee does not recommend another term and suggests that the pastor be encouraged to resign.

The pastor may invite a support person other than his/her spouse to sit in on this meeting.

Step 7 – Review committee and pastor meets with the Church Council or the Church Council Executive (or another group, depending on your church structure) to:

- Share the summary and interpretation of the review report.
- Review and recommend the changes in the pastor’s job description.
- Discern and formulate the recommendation for the extension of the pastor’s term including issues involving the pastor’s continued growth.

Step 8 - The review group writes a report summarizing the conclusions of the meeting described in the previous step (step 7). This report should be shared with the pastor and saved in his/her confidential personnel file. A confidential copy should be provided to the Conference Minister.

Step 9 – Make a brief summary report to the congregation in a form and at a time agreed upon by Church Council.

Step 10 – Send a letter of thanks to the pastor (and spouse) for their participation in the review process.

Grievance Procedure

Pastors sometimes feel the process of review is unfair or that respondents to questionnaires have been unduly harsh. Arrangements should be in place for the handling of possible grievances. It is suggested that a group be named (depending on who is conducting the review) who could fulfill this role. The persons handling the grievance should not be the ones who guide the review process.

The Conference Minister is available to assist congregational leaders and pastors in providing additional resources for the review process.

PART 2B
SUGGESTED PROCESS FOR REVIEWING PASTORS WHEN CONGREGATIONS
USE OPEN-ENDED TERMS AND “VOTE FREE” RENEWALS

(Congregations that use a vote to renew pastor's terms should refer to part 2A, pp 5-8)

Introduction – A growing number of congregations are beginning to consider an alternative to the idea of “voting” on pastoral renewals. They are requesting information and templates for open-ended pastoral terms. This exploration is prompted by requests from staff members who are tired of experiencing the anxiety associated with the votes that come every few years when it's “time”. Congregational leaders seeking a healthier alternative also encourage these ideas. Connected to virtually all these requests is an invitation to consider the understanding and theology we communicate when we rely on “voting” as our way of discerning and renewing a pastoral call.

This section suggests ideas that might assist your congregation in discerning an alternative method and in conducting pastoral reviews within this framework.

Current Practice – In most congregations, the current practice is to employ a congregational vote to call a pastor and to use ongoing votes (usually every 3 years, based on 3 year terms) to renew that call. Some congregations have already chosen to work with open-ended terms and become “vote free”; others have moved to 5 year terms after an initial 3 year term. However, the majority of our congregations are still “voting” regarding a pastor's ongoing work in the congregation at the end of each term.

Open-ended terms offer a possible alternative that would allow congregations to become “vote free” or at least to offer this possibility after the pastor's first term and a first renewal vote.

Does this suggestion mean pastors should not be reviewed and encouraged to grow in ministry?

Absolutely not! Healthy and ongoing assessment is always important and even more so when voting is not part of the renewal process.

Are open-ended terms designed to offer pastors an “easy ride” or to eliminate the option for a congregation to discern that their current pastor's gifts and character don't align well with congregational needs?

Again the answer is “no”. What is being proposed is actually a more thorough process of discernment, one that is also hopefully more consistent with our theology.

Open-ended terms could be structured in a variety of ways. This document shares one possible way of working with open-ended pastoral terms. (It is shared with the recognition that numerous modifications could be suggested.)

Recognizing that most congregations prefer to vote when the pastor is first called and then have a 2nd vote or 2nd call after an initial 3 or 5 year term (after they've witnessed and experienced the pastor's gifts and compatibility with the congregation), this proposal suggests moving to open-ended terms after the first term is completed and the congregation votes for the pastor to continue.

Foundational understandings:

- Open-ended terms require careful and purposeful ongoing reflection and a regularly scheduled annual time of assessment, review and discernment
- The congregation would appoint a Pastor Congregation Relations Committee (PCRC) or a Personnel Committee to be responsible for this process.
- The principles outlined in part 1 of this paper are equally applicable to this section.

Process for the Annual Review

Purpose: The purpose of the pastor / congregation review is to affirm and strengthen the pastor and congregation in their relationship and ministry. While points of stress or weakness may be identified alongside strengths and affirmations, the goal should always be to find ways to seek growth in personal, professional and congregational relationships.

Note: Since there is no connection between a review and a term renewal vote when using open-ended terms, the review process is fundamentally the same every year. However, while the process remains similar, it is strongly recommended that a congregation should be invited to contribute to the assessment of the pastor every 3-5 years. Without doing this, the congregation quickly feels that its voice is not being heard. By including this regular congregational process the congregation feels ownership, even though its “voice” is expressed in a different way than by voting. (For this reason, it is recommended that step 2 in the process that follows be added every 3-5 years.)

Step 1 – Pastor’s Preparation

The pastor prepares a written “self-assessment” that is to be submitted to the designated review group at least two weeks prior to a planned review meeting (see next step). This report should:

- Review areas of responsibility as outlined in the written job description.
- Report on successes in ministry.
- Report on growth areas, problems or concerns encountered in ministry.
- Share a statement of goals and vision for ministry for the coming year.
- Identify areas or questions on which the pastor would especially welcome feedback from the committee/congregation.

Step 2 – Listening to the Congregation (this step is included every 3-5 years; in other years, it is omitted)

The review committee solicits responses (written forms or another method) from persons within the congregation. The questionnaire and respondent group will vary according to what you want to learn. Some congregations involve the entire membership; others include a representative, randomly chosen group. The pastor should be given an opportunity to suggest questions or to express concerns about the questions that will be asked. The questionnaire should reflect both the pastor’s job description and information received from the pastor’s written report. The area Conference Minister or the Review Consultant is available for consultation in the formation of the questionnaire and can also provide some samples.

Step 3 – Review Group’s Preparation

The review group members individually prepare themselves for the review meeting by:

- Reading and reflecting on the pastor’s self-assessment.
- Summarizing what they see as the pastor’s areas of particular strengths and areas where growth is needed, based on their own experience and their pulse of the congregation.
- (In the years when Step 2 is included, the voice of the congregation would provide the basis for their summary of the pastor’s areas of particular strengths and areas where growth is needed.)

Step 4 – Review Meeting

The designated review group meets with the pastor. This meeting will include:

- An opportunity to ask questions about and to respond to the pastor’s self-assessment.
- Feedback to the pastor on his/her job performance. This will be based both on the pastor’s self-assessment and on the review group’s reading / “pulse” of the congregation. (In years when step 2 is employed, a summary and interpretation of congregational responses will also be shared.)
- A review of the pastor’s job description, memo of understanding and goals for the coming year.
- Clarify any questions and provide feedback and counsel for the pastor.
- The counsel and feedback should include the recommendation that they will be bringing to the Church Council. The options might include:
 1. That the pastor’s ministry continues; everything is satisfactory.
 2. That the pastor’s ministry continues, accompanied with a suggestion that improvement (strengthening of gifts, increase of skills) be sought in a given area of work (eg. that a greater amount of time be devoted to pastoral care).
 3. That the pastor’s ministry continues, on the condition that specific steps be taken in reference to a given aspect of ministry (eg. that he/she enroll in a course on grief counseling or preaching) within the next six months.
 4. That on the basis of the committee’s work and discernment the conclusion reached is that congregational needs and priorities do not intersect sufficiently with the pastor’s gifts, interests and priorities and that the pastor is encouraged to resign.

Step 5 – Summary Report

The review group writes a report summarizing the conclusions of the Review Meeting. This report should be saved in a confidential personnel file. A copy should be given to the pastor, to the Church Council, and to the area Conference Minister.

The pastor may respond in one of three ways to the report and recommendation. He/she:

- Can accept the report and recommendations, and act on them.
- May request an appeal process.
- May request a congregational vote on the matter. (This would be an unusual step and one that should be considered very carefully. The pastor would request this if s/he felt that both the review group and the Church Council were misreading the congregation.)

Grievance Procedure

Pastors sometimes feel the process of review is unfair or that respondents to questionnaires have been unduly harsh. Arrangements should be in place for the handling of possible grievances. It is suggested that a group be named (depending on who is conducting the review) who could fulfill this role. The persons handling the grievance should not be the ones who guide the review process.

Area Conference Ministers are available to assist congregational leaders and pastors in providing additional resources for the review process.