



December 2020

Dear Clergy and Staff Parish Relations Committee Members,

Finally! It is here! **The new and revised Annual Clergy Evaluation Form!**

A team of Cabinet, Board of Ordained Ministry, Staff Parish Relations Committee (SPRC), and other clergy members have been working with me over the past few months to revise our Annual Clergy Evaluation process. The Appointive Cabinet and Board of Ordained Ministry Executive Committee have approved this new format and process. It is not perfect, and no form will meet every clergy person's or SPRC's need, but we hope you will see it as an improvement over our previous process. We welcome your feedback.

Our guiding principles in revising the Annual Clergy Evaluation form were:

1. To **simplify** the evaluation process, developing a single online form.
2. To **eliminate the unhelpful rating scales and labels**. No one is inspired by "meeting expectations" or being labeled a "3 out of 5."
3. To continue the **Joint Dialogue** between the pastor and SPRC, as the District Superintendents (DS) saw this as one of the most helpful parts of the previous evaluation process.
4. To start the evaluation process with an **agreement on the roles and responsibilities of the pastor**. This differs significantly within each ministry context. Consider all the following are pastors: a deacon or elder serving in a local church, an associate pastor, or a part time or full-time local pastor. Please note the helpful **"Not Applicable" N/A option** in the evaluation section of the form. No pastor is expected to do everything. We claim the Priesthood of all Believers and the Body of Christ. Pastors and laity are most powerfully used of God when they collaborate and serve from their spiritual gifts, passion, and calling and when these are best aligned with the needs of the local ministry setting.
5. To provide an **OPTION** which would include **Seasonal Conversations** either with a few SPRC representatives and the pastor, or with the whole SPRC (your choice) throughout the year. Seasonal conversations help clarify wins, struggles, goals, and expectations for a season or 4-month period.
6. To continue to allow churches that may have their **own evaluation forms**, to use these in lieu of this new Conference Annual Evaluation form if approved, in advance, by their DS. The Lewis Center for Clergy Leadership LLPI 360 <https://lpli.org/> and the EM360 evaluation through GBHEM <https://www.gbhem.org/clergy/effective-ministry-360/> are also appropriate alternatives if approved, in advance, by their DS.
7. To keep the **due date of the completed evaluation form as 5/31** of each year but allow for a different date if approved, in advance, by the DS, if a new evaluation is completed every calendar year.
8. To focus on both the **"BEING" and "DOING"** of the pastor, reaching agreement on the number of hours worked each week within the church setting and, in the community, as well as times of vacation, renewal leave, and continuing education.

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9. To have another avenue in the continuing education section of the Annual Evaluation, for Local Pastors to report on the number of the required 20 Courses of the Course of Study they have completed, unless they have a M.Div. from a UMC University Senate approved seminary. Please contact, Holly Finley, at hflinley@flumc.org at the Office of Clergy Excellence, if you have any questions about this.
10. To provide video and print training for clergy and SPRC members.
<https://vimeo.com/498087651/571b39c19e>

So, how do I get started? I am glad you asked!

1. There is **ONE** online [Annual Clergy Evaluation Form](#) in which the clergy person may enter their self-evaluation and save this document by emailing themselves and the SPRC chairperson the link to the pastor's self-evaluation. The SPRC chairperson may then open the link and enter the consensus of the SPRC members' evaluation and the "agreed upon" items that have been discussed with and agreed to by the pastor.
2. The document may be **SAVED** at any time. You will be prompted to enter your email and the saved link will be sent to your email. **DO NOT HIT SUBMIT** until the entire document has been completed and signed by both the Chair of the SPRC and the Pastor!
3. A [Word document](#) and a [Pages document](#) are also available for individual SPRC members to provide their input to the SPRC Chairperson, who is responsible for entering the SPRC consensus of the evaluation into the link sent from the pastor that includes their self-evaluation. Each SPRC member should complete their own evaluation of the pastor prior to meeting as an SPRC to reach a consensus on the evaluation. The SPRC should meet separately **only** with pastor's prior knowledge, and as soon as possible they should invite the pastor to join the conversation.
4. The single final document must be signed electronically prior to submitting the document to the District Superintendent at your district office. See <https://www.flumc.org/districts> for contact information for your district office. **THIS COMPLETED DOCUMENT SHOULD NOT BE SENT TO THE OFFICE OF CLERGY EXCELLENCE BUT SHOULD BE SENT TO YOUR DISTRICT OFFICE. DO NOT SUBMIT MULTIPLE COPIES OF THIS FORM. JUST A SINGLE CONSOLIDATED FORM SIGNED BY BOTH THE SPRC CHAIR AND THE PASTOR.**
5. All active and retired clergy, lay supply, or Certified Lay Ministers who are under appointment or assignment to a local church in the Florida Annual Conference are required to have an Annual Evaluation form completed each calendar year.
6. There is an **OPTIONAL Seasonal Conversation Word document** posted on the Office of Clergy Excellence website. This document may be used throughout the year so that the clergy person and a few representatives of SPRC or the whole SPRC (your choice) can be in dialogue about goals and responsibilities throughout the year. **PLEASE DO NOT SEND IN THIS OPTIONAL SEASONAL CONVERSATION FORM TO THE DISTRICT OFFICE.** This is for your internal use only to inform your work together as you complete the single required Evaluation form.
7. There is an **Addendum section** on the Office of Clergy Excellence website with some helpful information that will assist you in completing the evaluation form. This includes a description of:
 - A. **ADDENDUM I:** The primary roles and responsibilities of a clergy person in a local church setting.

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- B. ADDENDUM II: A description of the various ministry settings.
- C. ADDENDUM III: The requirements for Licensed Local Pastors who have not yet completed their education.
8. **If the clergy person is projected to move**, an annual evaluation must still be completed, although there will be no need to set goals associated with the current ministry setting for the coming year. Such goal setting for the pastor should be discussed with their new SPRC at their new appointment. The SPRC may wish to identify goals they hope their new pastor will accomplish which they can discuss together once their new pastor is appointed.
9. **Deacons and Extension Ministers appointed beyond the local church in extension ministry settings** are **NOT** required to complete this Annual Clergy Evaluation form. They are required to complete their own annual report listed below.
- Deacons <https://www.flumc.org/annualdeaconreport>
 - Extension Ministers <https://www.flumc.org/extensionministryannualreport>

This process is fully electronic, and you do not have to print and send a hard copy of the evaluation to the district office.

Some clergy and SPRC members have indicated to us that they see the Annual Clergy Evaluation as a hoop to jump through with little benefit for either party. If this is your assumption, your expectations will likely be met. We believe that the Annual Clergy Evaluation can be a valuable tool in aligning goals and expectations that can result in more fruitful ministry for the Kingdom. We hope you will approach this process. The Book of Discipline ¶ 349.1 requires that an Annual Evaluation be completed on each clergy person and this can be a helpful tool in keeping your District Superintendent apprised of the fruitfulness and effectiveness of your pastor's ministry.

We would very much be interested in receiving your feedback about this new evaluation process. Please send your comments to myself smckinley@flumc.org and my assistant, Holly Finley, at hfinley@flumc.org

Love in Christ,

Rev. Sara McKinley
Director, Office of Clergy Excellence

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