

Pastoral Collaborative Performance Review

BASIC INSTRUCTIONS

**Developed by
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1. Best evaluations are a year-round process. Goals are agreed upon between pastor and church (usually the Council or Board or Pastor Relations Team). Regular check ins during the year (quarterly or half-yearly) are best practices. Towards the end of the year, a meaningful evaluation is ready to be conducted.
2. The instrument attached to this document is meant to be completed by the pastor, grading him/herself. Meanwhile, the church's representatives tasked with being the evaluation team completes a copy of this identical instrument, evaluating the pastor. Both sides apply grades to their evaluation
3. For superior evaluations, another instrument, based off the one offered here, should be created for the *church*. The pastor evaluates the church's care of, and responsiveness to the pastor's ministry, and other such metrics, while the church team does exactly the same in the identical instrument Both sides apply grades to their evaluation.
4. The evaluation process is not complete without an evaluation meeting. There, both sides compare and discuss their grades for each line item in the two documents. Based on the discussion, the final grade can be any of the following:
 - a. What the pastor scored
 - b. What the team scored
 - c. An average of both sides' scores
 - d. Higher than either side scored
 - e. Lower than either side scored.

The key is meaningful and respectful discussion and agreement.

5. The evaluation meeting then explores where either side can improve, in the coming year, in their ministry and in their relationship with each other.

Pastoral Collaborative Performance Review

COMPANION NARRATIVE

**Michael P.L. Friday
Evaluator**

John Brown, a native of New Jersey, is the 55-year-old pastor of Judson Baptist Church in Anytown, Louisiana. He has been on the job for 17 ½ years. John's responsibilities as pastor are **spiritual** (to lead the church in worship, meditation and into God's presence) **developmental** (to develop the congregation as Jesus-followers, to equip them for and lead them into acts of service – commonly called “mission”) and **organizational** (to lead the congregation to efficient planning, strategic decisions and the organization and deployment of their abilities and ministries).

John agreed to a collaborative performance review process with me. From the interview I mention, below, I was able to determine five (5) areas of performance in which John would be reviewed on a five-point scale. The performance areas are *quantitative, qualitative, organizational compliance, relationships* and *expertise and skills*. These are further defined in appendix I, below. The five-point scale is, in ascending order, *unsatisfactory, uninspiring, acceptable, excellent*, and *exceptional*, and graded 1, 2, 3, 4, and 5, respectively. The meaning of these grades are also located in the Evaluation Instrument. The Evaluation Instrument example constitutes the actual document with which John worked, first to understand the exercise, second, to evaluate his performance, and third, to assign himself a performance grade. It is the same document I used to review John. The completed document reveals my grades and comments.

Because I am neither an employee nor a member of Judson Baptist Church (hereinafter referred to as “Judson”), I had to arrange an interview with John to ascertain information about his performance, his work environment and the issues attending both, for the year under review – 2021. This interview, conducted by telephone on November 6, 2021, was a comfortable experience, in which John talked freely about his journey through ministry and leadership during 2021. He was unguarded, and this was, perhaps, due to the trust he and I have developed of each other, serving in the same region for seven years. This went a long way to discerning John's

truest feelings about his work, and it would help again, later, in the collaborative performance review when I would meet with him face to face.

During the phone interview, I determined that while Judson had no concrete goals set for himself in 2021, John had set himself some goals (though these were not made clear in the interview, thus affecting the original score I had afforded him in the performance review for that category). During the actual review, however, I got a much better picture of John's goals – chiefly, two: (1) help the church's four councils (and several more committees) streamline themselves better for more efficient organization, work and ministry; (2) organize a ministerial association for the Judson area of Anytown, with pastors of other congregations.

My discovery and appreciation of these two goals led me to agree with John's grade of himself in the category of the balanced scorecard where their consideration fell – a grade which was higher than the one I apportioned him; this because he did make some progress with both, although neither was fully realized. These partial successes, along with John's function in the general areas of pastoral ministry earned him a grade of *acceptable* in the **quantitative** category. I encouraged John about the wisdom of leading Judson to articulate goals for 2022; I also suggested that the tremendous benefit to him *and* the church is that goals would make it easier for them to track, measure, assess and manage, overall, their performance.

In the **qualitative** category, the quality of Judson's worship and pulpit ministry, both primarily John's responsibility, plus his obvious and prevailing concern and care for his congregation's health earned him (in both his judgment and mine) a second grade of *acceptable*, despite the fact that Judson's health is not where John would like to see it. He has faithfully performed the tasks of leading worship, diligent preaching and attention to the congregation's spiritual and other health.

Next follows the **organizational compliance** (or **operational**) category. Whereas the qualitative category considered the *quality* of Judson's worship and pulpit ministry, the operational category observed John's organizational practices. I found that his organization of the congregation was *excellent* – a grade he accepted above his *acceptable*. One key factor here is that in a program called the *Missional Church Project* (MCP), run two years ago by American Baptist Churches Louisiana (to which Judson belongs) Judson was already doing *exactly* what the MCP was teaching, precisely because John had so organized Judson to function; and Judson continued to function in this missional way during 2021.

Fourth is the category of **attitude and relationships**. During the phone interview, John observed that he tends to be pretty hard on himself, and it showed here. There was a huge disparity between his grade and mine: he a 2 (*uninspiring*) and I, a 5 (*exceptional*). While John focused on his inability to move the church to a deeper level of relationships, I focused on John's ability to remain positive, cheerful, punctual, regular and effective despite (a) his pastor/staff relations (HR equivalent) committee's failure to be a true employee champion; (b) the congregation's relational shallowness and (c) a reduction in his income during this review period. Additionally, some reports I have heard from persons more *au fait* with John as pastor, and observations I have made of him in other settings where I could gauge his attitude, allowed me to apply the *exceptional* grade.

Finally, in the category of **expertise and skills** I also scored John as *exceptional*, while – again – he scored himself lower (as *acceptable*). After we discussed this, and upon my reflection and reconsideration, we agreed that the score of *excellent* was the most appropriate of the three. In this category, John pursued continuing education opportunities that not only increased his value to Judson but improved his ministry capacities. He is astute about his context of ministry to the extent that he studies trends that affect Judson's health, and applies these to his work, his

thinking, preaching, teaching and general ministry. John calls this skill “discernment”. He is acutely aware of Judson’s health and risks, and I am of the opinion that the honing and deployment of these skills augur well for his and Judson’s improvement in 2022 if certain measures are taken – measures I discussed with John at the end of the review, and which I shall indicate a bit later.

Overall, John’s score is 19, with a 3.8 average, rendering him in round figures, a 4 – an *excellent* employee, and an excellent pastor. Our notions are not the same about Judson; although John and I both informally consider Judson *uninspiring-to-acceptable*, caution must be applied with announcing a verdict about Judson *without* some kind of organizational score card applied to them as well, with its own set of criteria.

Regarding the review meeting process and experience itself, the performance review meeting was held November 12, 2021. John had had almost a week, after the interview, with the Collaborative Performance Review Document and Guidelines (appendix I), to reflect on his performance during 2021, in relation to the categories of review and the description of the grades in the guidelines. I allowed him to alert me when he was ready. We met in John’s office, and spoke comfortably. He reflected on the experience and reported that it has given him some constructive and encouraging ideas about performance, both his and the congregation’s, for implementation in 2022. John was invited to share his grades and comments, after which I followed with mine. A rich discussion (just as the interview was) followed, which was encouraging and stimulating for assessed and assessor alike. There is no doubt that, were John and I members and employees of the same organization, we would continue to collaborate, not only about performance issues, but job-sculpting issues, being championed, his general welfare, and innovations for the “company” – Judson Baptist Church.

There were some further issues I raised with John, with which he promised to engage. First is the need for Judson, as well as John, to set goals. Second, at my inquiry, he thinks that he can initiate a group that can reflect with him about Judson's development; this, in response to John's expressed feelings of inadequacy. Such a group may be of immense encouragement to him. Third, arising from our discussions both in the interview and performance review meeting, I raised a concern about the risk John's creativity runs of being stifled at Judson. I noted that the implications of an excellent performer functioning in an ordinary organization are at least twofold: either s/he could face frustrations as the organization remains obtuse or uninspiring, or s/he could encounter immense opportunity, by way of applying his/her excellence in creative ways to inspire and move the organization forward. John agreed to begin 2014 with some new, fresh goals that subscribe to the S.M.A.R.T. criteria: specific, measurable, actionable, reachable and time-sensitive. We are both optimistic about this. Fourth, I advised John that, while categories of *timeliness*, *cost-effectiveness* are usually included in a balanced score card, I could not include the former, due to the absence of time-specific goals in his 2021 time period. Regarding the latter, although neither John nor Judson display any signs of profligacy, and although John has willingly taken a salary reduction in view of the church's continuing financial challenges, I did not consider these as sufficient bases for including this category. Additionally, John had no particular or specifically identified *pastoral* roles, during 2021, which were tied to or directly affected the church's financial well-being for better or for worse.

Finally, through this experience, I have had some misgivings about my choice of nomenclature for the category called *uninspiring*. It warrants revisiting. I came to find the term a bit on the emotive rather than descriptive side, as well as having the propensity to be negative rather than unemotional.

Pastoral Collaborative Performance Review

INSTRUMENT

**Michael P.L. Friday
Evaluator**

COLLABORATIVE PERFORMANCE REVIEW and SCORE CARD

For The Reverend John Brown

I. Categories of Performance to Be Evaluated

Quantitative

This category is looking for professional/pastoral goals that were set and met. Goals that are specific, measurable, actionable, reachable and time-sensitive are the easiest to recognize and evaluated. How did the pastor do in this category?

Qualitative

This category is looking for quality of ministry: ministry outcomes such as the impact of one's preaching ministry, how the church's spiritual development has improved or declined because of the pastor's general ministry, and other areas of congregational quality to which the pastor may have contributed.

Organizational Compliance

This category has to do with how well the professional has observed standard congregational procedures; it is looking for how well he has organized the church for ministry during the period under review.

Relationships

As the name implies, the pastor's contribution to forging good relationships is under review here; does he foster good and productive relationships that strengthen the church's viability overall, or does he contribute to weakening them?

Expertise and Skills

Has the pastor improved his professional skills in the period under review? How well has he utilized, implemented or demonstrated these skills in the course of this period? Has he made himself more valuable to the organization during this period?

II. Categories of Grades to be Applied

<i>Grade Name</i>	<i>Meaning/Explanation</i>	<i>Grade Value</i>
Exceptional	Standing way beyond expected performance levels	5
Excellent	Highest level of performance expected	4
Acceptable	The level at which all pastors are expected to perform	3
Uninspiring	Performance level that accomplished only the bare essentials	2
Unsatisfactory	Performance that fell beneath even the bare essentials	1

III. Instructions to Evaluator/Self Evaluator:

In the score sheet on the following page, consider each category of **performance** above, and apply a grade and value as you see the candidate/yourself. You may tally and determine the average grade value if you wish; this will be done at the collaborative review meeting.

COLLABORATIVE PERFORMANCE REVIEW BALANCED SCORECARD

Pastor's Name: Rev. John Brown

Date: November 12, 2021

Area of Performance	Grade Name	Grade Value	Reviewer's Comments
Quantitative	Acceptable	3	<i>Could John challenge both himself and Judson toward specific goals? This grade suffered for lack of concrete goals; therefore it was hard to measure the true <u>quantity</u> of performance. This grade is not related to the church's reduced budget or membership, neither for which should John be held responsible at all. John's inability (by his own admission) to exceed any goal for 2021 may be corrected, in 2022, in this category.</i>
Qualitative	Acceptable	3	<i>The quality of Judson's worship and pulpit ministry, both primarily John's responsibility, and his reasonable concern for the congregation's health are factors here. The congregation's health is generally fair; it cannot be said to be 'excellent'.</i>
Operational	Excellent	4	<i>The following factors went into this grade: the organization of worship, preaching, outreach, organization of the food distribution and soup kitchen to which John contributed; the development and utilization of lay leaders. That the church was already where the MCP wanted it to be is a sign of John's organizational excellence.</i>
Attitude and Relationships	Exceptional	5	<i>John's ability to remain positive, cheerful and effective, despite (a) his pastor/staff relations committee's failure to be a true employee champion (b) the congregation's relational shallowness and (c) his reduced income, added to his various attempts at building relations are not merely admirable but commendable. One hopes Judson responds with the depth of relationship which John urges on them and exemplifies</i>
Expertise and Skills	Excellent	4	<i>John displays commendable diligence with continuing education. His "discernment" as he calls it, derives from his keen attention to his context of ministry, staying current via reading and study, and the application of this to his ministry skills and pastoral work.</i>

GRADE TALLY 19

GRADE AVERAGE 3.8

GRADE AWARDED: EXCELLENT

Pastor Signature _____ Evaluator Signature _____

Other Comments:

1. How can John keep his creativity alive and shield it from becoming stifled?
2. Could John initiate a group, interested in the church's development and his feelings of inadequacy, of which we spoke?
3. Would he consider leading Judson into SMART goals in 2022, which would help improve both his and their performance?
4. My inability (due to my limited involvement with Judson Baptist) to grade on three other categories commonly included in a balanced score card: reports from colleagues/peers within the organization, time and cost-effectiveness.

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COLLABORATIVE PERFORMANCE REVIEW and SCORE CARD

For The Reverend _____

IV. Categories of Performance to Be Evaluated

Quantitative

This category is looking for professional/pastoral goals that were set and met. Goals that are specific, measurable, actionable, reachable and time-sensitive are the easiest to recognize and evaluated. How did the pastor do in this category?

Qualitative

This category is looking for quality of ministry: ministry outcomes such as the impact of one's preaching ministry, how the church's spiritual development has improved or declined because of the pastor's general ministry, and other areas of congregational quality to which the pastor may have contributed.

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This category has to do with how well the professional has observed standard congregational procedures; it is looking for how well he/she has organized the church for ministry during the period under review.

Relationships

As the name implies, the pastor's contribution to forging good relationships is under review here; does he foster good and productive relationships that strengthen the church's viability overall, or does he contribute to weakening them?

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Has the pastor improved his professional skills in the period under review? How well has he/she utilized, implemented or demonstrated these skills in the course of this period? Has he made himself more valuable to the organization during this period?

V. Categories of Grades to be Applied

<i>Grade Name</i>	<i>Meaning/Explanation</i>	<i>Grade Value</i>
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COLLABORATIVE PERFORMANCE REVIEW BALANCED SCORECARD

Pastor's Name: _____

Date: _____

Area of Performance	Grade Name	Grade Value	Reviewer's Comments
Quantitative			
Qualitative			
Operational			
Attitude and Relationships			
Expertise and Skills			

GRADE TALLY _____

GRADE AVERAGE _____

GRADE AWARDED:

Pastor Signature _____

Evaluator Chair _____

Other Comments: