INTRODUCTION
Accountability Begins With Baptism

Accountability is a concept built into our Baptismal Covenant (BCP pg 304-305). National and Diocesan Canon Law (Title III) assumes a web of accountabilities involving vestry, congregation, priest and bishop. Paid workers have to be accountable to whomever provides compensation. Volunteers are accountable, by virtue of their baptism, for ministry in the church, and in the world. All members of the church, whether salaried or not, are receiving God’s gifts of life and salvation. Accountabilities in ministry, compensation and stewardship are all related.

In the church, evaluation of the priest’s professional performance is only a small part of the review of mutual ministry. We actually look at everything that goes on in a parish ministry done by clergy and laity alike. For the purposes of this study the term “review” includes evaluation, planning, dreaming, etc. “Evaluation” is a judgment upon what has gone on before and therefore is only a part of review. The purpose of review is to develop strong ministry. The central question is “how well is this congregation and its ordained leader(s) meeting God’s and our expectations of what can be achieved in our mutual ministry?”

Stewardship and Accountability

No ministry belongs to one person alone. Lay people and clergy alike share accountability for the stewardship of ministry.

So it is well to examine the purpose: what is being reviewed—and to what end? This process assumes that it is ministry that is being reviewed—ministry of the priest AND lay people together in a specific community of God’s people, your congregation. A review tests the condition of this ministry, its accomplishments, its performance, its results. These results are measured against certain voiced or unvoiced expectations and accountabilities. Some of these may be found in the parish profile, in priests’ documentation of themselves, and in the agreements entered into when the priest was called. Others, the unvoiced ones, are to be found in the values of your parish, its goals and the environment for ministry of your community.

Although many current contracts between vestries and clergy include provision for a mutual agreement, it is often difficult to agree on a process that serves the needs of the local situation. If things are going well, there is temptation not to do a review at all. If there are any disappointments on either side, the temptation is to use the review as an outlet for the frustration which can occur at the discovery that things have not turned out as expected.

Omitting an evaluation in happy times is almost always a mistake. When tension has developed, evaluation is not the issue. The issue is problem solving.
Many models for mutual ministry review have been offered ever since “performance appraisal” became a popular management tool in secular institutions. Most of these models do not fit the church because they assume that one party, usually “management”, is evaluating the other—usually a subordinate. Such a perspective is unacceptable in the mutual ministry relationship of congregation and priest. Neither party is superior, and neither one is subordinate. Ministry is a mutual undertaking for clergy and lay people together.

**MUTUAL MINISTRY REVIEW**

Whether formal or informal, “evaluation” happens all the time. It is, therefore to everyone’s advantage to have a planned, intentional process. No single plan is the ideal model. This guide is intended particularly for parishes and clergy already familiar with the national Church Deployment Office instruments (personal profile and parish search request). Review can be undertaken by using an up-to-date parish self-study, and an on-going process for planning and goal-setting—for the parish and the clergy—separately and together.

WE URGE THAT ANY REVIEW PROCESS BE UNDERTAKEN ONLY WITH THE HELP OF AN OUTSIDE CONSULTANT OR SKILLED FACILITATOR.

Ministry review contains two similar but distinct review processes. Depending upon the size of a congregation and the amount of ministry to be reviewed, these processes can be done in one or several sessions. We recommend that a first step to mutual ministry review includes deciding on whether to separate them or do them together. Your consultant can be helpful with this decision.

The first review (PARISH MINISTRY REVIEW) is intended for the development of all facets of a parish’s program and mission. Here we look at all that goes on, what is expected of both clergy and lay persons, and how we can develop and strengthen the total ministry of the institution.

The second (RECTOR DEVELOPMENT) is intend to focus on the ministry of the priest alone. Our aim is to develop that unique ministry of an ordained person in the context of a community’s life together.

*We mean by “Rector” the ordained leader of a congregation whatever title that person is called, e.g. Vicar, Priest-in-Charge, Interim Rector, etc.

**WHY DO A REVIEW?**

Any discrepancies about purpose and accountability, however they may be expressed, must first be reconciled for mutual ministry to be reviewed effectively.

At its best, review provides an equitable way for clergy and lay people to find out what is expected of them and how well they are doing the jobs they have agreed to and want to do together.

Traditions of confession, reconciliation and disciplined prayer lead us continually to examine whether we are indeed doing what God wants us to do. In the major covenants of the Prayer Book, the congregation pledges itself to support the person or persons making vows baptism, confirmation, marriage and ordination. Without some kind of examination, how do we know whether this support is being fulfilled? The desire for testing is itself a sign of hope—an indication that something else is possible; that deeper meaning and greater effectiveness can be sought and won.

Many clergy want to grow in professional effectiveness and are concerned that they meet standards of performance at respectable professional levels. They want to see excellence in the results of ministry, and are willing to work to contribute to developing that excellence. This objective is a likely outcome of a disciplined planned process of mutual and
reciprocal review of ministry (both clergy and lay) conducted at regular intervals—based on previously agreed-upon goals and expectations.

PART I
PARISH MINISTRY REVIEW

Though much of the ministry of a congregation relies on the ministry of a priest, the priest is not the focus of total ministry review. Rather, the focus is the work of the congregation. How is the CONGREGATION doing? What is going well? What needs improvement? Are we being faithful to our mission? Review of ministry is for the purpose of development.

All these questions are ones the priest asks continually. Your priest is a valuable resource for planning and review. So, while the priest is not the focus of this review, the priest is an essential member of the reviewing team. The partnership between priest and lay persons can be strengthened through such a review. They are equals in their love for the congregation and faithfulness to the call God has issued to them. This partnership can insure growth in the ministry of a congregation and in the faith journeys of those who are a part of that ministry. In an atmosphere of trust and mutual interdependence, the people of a congregation can feel supported in their life as a worshipping community.

MUTUAL MINISTRY REVIEW
Sizing Up the Congregation

Getting clear about where the accountability lies is the most important part of a review of the ministry of a congregation.

In “Sizing Up a Congregation”, Arlin Rothauge provides a helpful way of thinking about how congregational size determines structures for ministry. Rothauge describes four kinds of congregations: Family; Pastoral; Program; Corporate. Each of these models suggests differing contracts for accountability. For instance, in a “Family” sized congregation, there is likely to be strong overlap among principal lay leaders and the membership of the Vestry. But in a “Corporate” type of parish, there will be many more committees and lay leaders with little actual overlap with Vestry membership. But no matter the congregation’s size or style, for better or worse, someone is accountable for every ministry of a congregation. Determining who is the first step in Parish Ministry Review.

LAY MINISTRY vs.
LAY LEADERSHIP

There is much discussion throughout the Church about Lay Ministry. Each of us, at baptism has been given a ministry in the world. Whether or not a person is a leader of some aspect of the work of the church, all persons are “ministers.” In Parish Ministry Review the aim is not either to challenge or to criticize the ministry of an individual. Rather, the goal is to enhance the ministry of the CONGREGATION by insuring that whatever objectives were set are, in fact, being carried out.

Lay Leaders are called by the congregation to accountable ministry. Along with the clergy and Vestry they mean to achieve a clearly defined and understood end. After a period of time, it is helpful both to the individual and to the leadership to check and see just how that ministry is progressing. This check-in time is what Parish Ministry Review is all about.
FOUR STEPS IN MUTUAL MINISTRY REVIEW

Regardless of the size of the congregation, all Mutual Ministry Review proceeds along similar lines.

1. Decide exactly what is to be reviewed—A good method is to take a look at what gets done—Pastoral Care, Financial Management, Outreach, Liturgy, etc. Develop and keep an ongoing list of all that the congregation does. You may not want to review all that is going on in a congregation. For example, the Altar Guild ministry might be going along just fine and its leader feels review isn't helpful each time you gather to Review. Three criteria are helpful in determining what to review:
   a) IS IT TIMELY? Every congregation develops initiatives in ministry from time to time. You might want to check out those objectives carefully in the beginning stages.
   b) IS IT CANONICAL? Lay leadership in a congregation is responsible for certain aspects of ministry distinct from those of the clergy. These should be reviewed carefully.
   c) IS IT SOMETHING WE WANT TO SEE A BIG CHANGE IN? These criteria are like shining a spotlight on an area of ministry of particular importance to a congregation.

Sometimes things are not going as well as you might like and you feel increased attention will help to make improvement. Other times things can be going quite well, but there is a surge of enthusiasm for that area. Review can be a way of helping emphasize the importance of that ministry in the life of the congregation.

Again, it is important that you begin with a list of all that is happening in the congregation. That way you can be sure that you have a picture of the total ministry of the congregation.

2. Look at what’s gone on—Once you know what you are going to review, decide on who will review and against what expectations or goals. How are things going in that area of the parish ministry? Did you meet expectations? Why? Why not? Remember, blame is not helpful. You need to learn from failures. It is also important to celebrate successes.

3. Set plans for the future—Once you have developed an idea of how things went, spend some time envisioning the future. Is this something you want to continue? What will be achievable goals during the next review period? Who will you want to lead this effort?

4. Call someone to this ministry—Whether clergy or lay or a team, it is important that someone be accountable and agree with your vision for this ministry. Here are some suggestions:
   —share your review of the ministry with the person(s) you wish to call.
   —share your visions for the future.
   —explain why this person(s) is the one to enter into accountability with you for that ministry.
   —explain what resources (financial, people, materials) are available.
   —avoid “recruiting” language. You are talking about ministry. You hope the person(s) called will grow in their faith through work in this ministry.
   —if they accept, get concurrence with the vision and the goals. Explain there will be a review of the ministry at the end of the review period.
   —develop a way to check in with your lay leader from time to time offering support, encouragement and listening for their needs.
CARING FOR THE LAY LEADERS

There is a temptation to leave lay leaders alone between reviews. This may seem to express confidence. However, every ministry that is important enough to warrant a lay leader requires care from all of the leadership. Lay leaders will appreciate the interest and concern of their fellow leaders. In addition there may be chances to help make linkages between lay leaders to help each find resource in the others.

Evaluation of programs and ministries within a congregation is not a matter of putting people on the spot. If we truly believe that God is calling us to effective ministry, then persons who enter into accountability for those ministries are partners in the work of the church. Care should be taken to define objectives that are achievable by that particular person. Success in meeting objectives can be a faith growing experience. Failure can be discouraging.

PART II
RECTOR DEVELOPMENT REVIEW

The purpose of the Rector Development Review is growth within a ministry. Because of this, we strongly recommend that this process be initiated at the beginning of a pastorate. Thus, each year growth can be celebrated and encouraged. Starting in the fourth or seventh year of a pastorate leaves a lot to review and can cause an unreal weighing of some of the data. When review is a part of the ongoing life of a parish and priest from the beginning, it is far easier to see development and not judgment as the goal.

Clergy who care about their work ask two basic questions: “How am I doing?” and “How can I do what I am doing better?”

Most systems for Rector Development build in the following characteristics:

• A protective, supportive climate to help pastors deal with the personal dimensions that are close to their work, and to face negative feedback.

• Possibilities for developing growth through resources such as continuing education.

• Opportunity to do something about what is discovered.

• Clear, measurable, achievable expectations.

OBJECTIVES OF RECTOR REVIEW

Clergy are continually confronted by conflicting expectations. Many clergy find it difficult to get a clear reading on their own effectiveness, achievement, or development. Few lay people know how a priest’s time is spent . . . or how it should be spent.

Rector review is to improve performance: to affirm what’s going well, and to revise mutual expectations. It is never to resolve conflict, or to correct what is clearly unsatisfactory performance. (There are other resources and techniques for conflict resolution.)
Reasons to Do Rector Review

- To celebrate what is going well—and to identify what needs to be changed.
- To give clear and reliable feedback.
- To strengthen relationships by sharing concerns about priestly and professional development.
- To minimize or eliminate unrealistic expectations.
- To renew personal and parish goals.

SHOULD COMPENSATION BE TIED TO REVIEW?

Over the centuries there has been much thought given to the question “What does a stipend pay for?”

Some lay people may believe that the job description, on a secular model, answers the question. This suggests a contractual accountability spelled out legalistically—quid pro quo.

Others are likely to see accountability expressed in the commitments articulated in the baptismal covenant, the catechism, the ordination service and the service of Celebration of a New Ministry. St. Paul says those who preach the Gospel should get their living from it (I Cor. 9:14). Another view is that the priests are paid not only for what they do, but also for what they know and what they are. Still another view is that the priest is paid a living, not for work done, but so they won’t have to find other sources of compensation.

Whatever the view, there seems to be a link in many peoples’ minds between performance and compensation. A salary policy for congregational leaders must take into account the results of a review of a person’s ministry.

However, review should be separated in time from annual salary negotiations. The purpose of review development. Giving a raise is not a substitute for quality feedback on a person’s ministry. Withholding a raise is not a good way to encourage professional development.

We urge you to keep the processes separate in time and to use both to continue the quest for excellence ministry.

RESPONSIBILITIES vs ROLE

A Rector is also a Priest. “Rector” implies responsibilities and tasks, while “Priest” implies role. Rectoring means doing. . . planning services, teaching youth, supervising staff. Priesting means being. . . a bearer of holy things, prophetic, open, loving. Rectoring calls words like: professionalism, competence, performance. Priesting calls up: spirituality, faith, mystery.

Professional Development is best understood, then, in the context of the Rector’s total vocation and ministry which includes:

- Responsibilities,
- Role, and
- Plans for the future etc.
RESPONSIBILITIES
Preaching
Pastoring
Administering

RESPONSIBILITIES
Rectors provide administrative authority, organizational leadership, pastoral care, and guidance toward growth. They are the organization’s key for resources, action and reaction. Their primary vocation is commitment to the organization. The effectiveness of the congregation’s total ministry depends to a large extent on what the lay people expect of their rector, how they share the ministry, and how they contribute toward it.

ROLE
Being a spiritual person
Being a sacramental person
Being authentic etc.

ROLE
Priests are central by what they symbolize to the congregation, and by the way they represent the congregation to the wider community. They are central and symbolic in the way they express personal faith, care and commitment, especially when that faith and commitment are visible to other people and influential in their lives.

SIX STEPS IN PROFESSIONAL REVIEW OF A PRIEST

1. Develop a process—The process which is adopted must fit the local situation and its participants. This does not mean re-inventing a wheel, but rather choosing the approach which fits the style of the team and can be completed in the time available. The process must be mutually developed, considering the needs of both priest and congregation. To get started:
   —Take a look at what your priest has done over the last three months. This calendar review will usually give you a good list of tasks.
   —Make a list of the commonly-held expectations for the Rector’s performance. (e.g. job description, parish needs profile. See also Appendix A and B of this document)
   —Interview parishioners, the Bishop, other clergy. Ask, “When you think of the Rector of this parish, what qualities do you feel should be present?” This will give you a head start on some of the “role” items you might cover in review.
   —Your priest must be a part of this from the beginning. Without agreement the review could begin on a defensive note. Once everyone agrees to a “working document” it is time to form a team.

2. Form a team—Choice and preparation of the team, which will include the priest, can make or break a review. The whole team must thoroughly understand and trust the concepts, style, and objectives of the review process. Any members of the team who have not helped to shape the elements of the process should be fully informed before they participate.
   The team should include three or four persons in addition to the priest. We also recommend the use of a consultant to guide the process. It may be helpful, too, to have the priest select an “advocate”—someone who “sits at the clergy’s side.” Review is an in-depth look. A small number of people in the review process can help insure that the feedback will be carefully and sensitively presented.
   The priest, as both the spiritual and temporal leader of the parish, may have overall responsibility for initiating and guiding the review, but need not be involved in every detail of planning and administration. Priest and vestry together can select a lay person as operating head of evaluation team.
3. **Collect information**—The review team should seek consensus on the performance of the priest through meeting together and reporting on observations that it has gathered. These observations may come from individuals on the team and from individuals with whom they have spoken. The most useful information will be current, typical, specific and identified. “Current” means facts and figures which reflect recent events. “Typical” is important because one out of character moment generally means little. “Specific” refers to a certain moment not a general statement. “Identified” means that the source of the information is clearly known (not of the casual or mysterious nature implied in statements like “Lots of people say . . .”). Remember: one important source of data is the priest.

4. **Rector report**—At the same time the review team is collecting data, the Rector reviews the document and reports “typical” behavior in each of the categories. These should be specific, typical and current as well.

5. **Share the findings and conclusions**—The team comes together with the Rector to discuss each others’ findings and to negotiate a common list. This is the climax of the review process. This discussion should be held in a supportive and mutually affirming atmosphere. Different interpretations emerge, so there should be some attempt to recognize and account for the differences. We suggest that the priest be the “secretary” of the team, writing the final report for all team members to sign.

6. **Determine and agree upon the implications and disclosure of the team’s conclusions**—There will be reasons to celebrate, and there will be recommendations for significant changes in some aspects of parish life. In any event, the goal is development of ministry. Specific objectives for the priest should be agreed upon and incorporated into the next review. This report can be shared with the Vestry. We suggest a summary rather than the full report. The aim here is communication, not a second review.

**RECTOR DEVELOPMENT CYCLE**

**I. ADVANCE REVIEW**
(Rector and Review Team Separately)
1. Review past objectives
2. Cite specific examples of typical performance in each area to be reviewed
3. Agree on how to share the data

**II. DEVELOPMENT DISCUSSION**
(Rector & Review Team)
1. Discuss past objectives and responsibilities
2. Review performance and develop a common list
3. Agree on objectives for next year
4. Agree on how to accomplish objectives . . . incorporate significant strengths and growth areas
5. Report results to Vestry (a concise summary not every detail)

**III. CHECKPOINT CONFERENCE**
(Rector & Review Team)
1. Review progress on objectives
2. Adjust objectives as necessary
OBJECTIVES FOR THE FUTURE

Like the Parish Ministry Review, the Rector Review process is designed to focus on a limited number of development objectives. These objectives require special attention by the Rector over a period of time (usually six to twelve months).

Plans for the future should be specific, measurable, achievable and compatible.

Specific—clearly defined so that the desired outcome is clearly understood.

Note that “specific” does not mean “confining”. The plans should be broad enough to be durable, that is, appropriate and achievable even as events change.

Measurable—desired outcomes stated in measurable or observable form so progress is clear.

Achievable—challenging, but realistic; what we agree to, we fully expect to do.

Compatible—congruent with other plans and values in the parish. If plans in some way contribute to the overall church mission, they are compatible.

Remember, the purpose is to focus on major opportunities. It is far better to handle effectively two or three projects than to work ineffectively on six or seven.

Do you want the Appendices & Bibliography included?

APPENDIX A
Norms for clergy can vary more widely than norms for congregations. But there are some common denominators for duties and competence.

The Ordination Service (The Book of Common Prayer, pp 531 & 532) states what the Church expects of priests—what they are ordained for.

• To work as a pastor, priest and teacher together with the Bishop and fellow presbyters.
• To share in the councils of the Church.
• To proclaim by word and deed the Gospel of Jesus Christ.
• To fashion their lives in accordance with the precepts of the Gospel.
• To love and serve the people among whom they work, caring alike for young and old, strong and weak, rich and poor.
• To preach.
• To declare God’s forgiveness to penitent sinners.
• To pronounce God’s blessing.
• To share in the administration of Holy Baptism.
• To share in the celebration of the mysteries of Christ’s Body and Blood.
• To perform other ministrations as entrusted.
• To respect and be guided by the pastoral direction of the Bishop.
• To be diligent in reading and studying of Holy Scripture and in seeking knowledge of such things as may make them stronger, more able ministers of Christ.
• To be a faithful pastor to all whom they are called to serve and to work together with them and with their fellow ministers to build up the family of God.
• To pattern their lives and that of their families, households or community in accordance with the teachings of Christ so that they may be wholesome examples to the people.
• To persevere in prayer, both public and private.
Portions of the Catechism also relate specifically to ministry, especially the sections on Old Covenant, the New Covenant, the Church, the Ministry, and Holy Baptism. (BCP, pp 845-862). Finally, because all ministry is rooted in our membership in Christ, everyone participating in evaluation should be familiar with the Baptismal Covenant (BCP, pp 304-305).

APPENDIX B
PASTORAL SPECIALTIES
As with other instruments of the Church Deployment Office, Pastoral Specialties can be adapted and modified to fit the evaluation process at the present stage in the history or life of the relationship. They are one of the many devices which may be useful in naming and prioritizing the values and activities which priest and congregation now find to be important in their mutual relationship.

• Teacher-Children: teach and work with pre teenage children.
• Youth Worker/Teacher: teach and work with youth.
• Teacher-Adults: teach and work with adults.
• Visitor-Homes: visit church members in their homes.
• Pastor: care for people so that they are nurtured and challenged for growth within the community of faith.
• Crisis Minister: respond to people at significant points in their lives e.g. death, dying, sickness, birth, trauma, success.
• Counselor: Assist, in a counseling setting, persons facing problems or decisions.
• Administrative Leader: manage the affairs of the congregation including programs, organizations, finances, etc.
• Evangelism Leader: train and lead others in relating the Christian faith to the lapsed and to persons outside the church.
• Ecumenical Leader: participate in programs sponsored inter-denominationally or jointly by a number of churches.
• Social Ministry Leader: enable persons within the congregation to become aware of and participate in issues.
• Community Leader: through personal involvement to organize community groups to meet stated needs such as drug problems, fair housing and school issues.
• Stewardship Leader: lead lay persons in the development and use of individual and congregational resources.
• Theologian: demonstrate a disciplined understanding of biblical and historical revelation and the perception of God’s activity in the world.
• Preacher: preach with clarity and make the Gospel relevant to people’s lives.
• Liturgical Leader: plan and conduct liturgical services of public worship.
• Spiritual Guide/Leader: lead and train others in the formation and development of a spiritual discipline.

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