



# Diocese of Texas

## CLERGY PERFORMANCE REVIEW FORM

### INSTRUCTIONS:

The purpose of the clergy Performance Review is to provide an opportunity for reflection, valuation, and discussion of the overall work of clergy in the Episcopal Diocese of Texas. The performance review is designed to be used in an open, two-way communication format highlighting achievements and strengths, as well as under-utilized capabilities and opportunities for development. The spirit of the review is intended to be prayerful, supportive, and enlightening. The review should be carried out in awareness of its spiritual context.

The evaluation is to be carried out by the Senior Warden with input from others selected by the clergy being reviewed and by the Senior Warden.

The review process includes the following:

#### 1. Preparation.

- Set a time for the review, and agree on the period under review.
- Describe the key focus of work for the review period on page 2 of the form, including any specific goals or objectives for the period of time under review.
- Review Sections 1 and 2 of the form and agreed upon those factors appropriate to the review, or modify the list prior to the completion of the form.
- Together, select 3 to 5 people who will provide input on performance of the rector, vicar, or assistant clergy. Those providing feedback may include other staff, congregants, diocesan representatives, or leaders in the congregation or community. However, only those who have extensive knowledge of the person's work and capabilities should be asked to provide input.
- The Senior Warden solicits input as designed. This may be in person, by phone, or by e-mail.
- Other materials such as the congregation's values, mission, and vision may be included as part of the context of the evaluation and to ensure alignment of focus and approach by the person being reviewed.

#### 2. Form Completion

- The person being reviewed completes the assessment of their work carried out in the period under review and transmits their comments to the reviewer. Comments should be descriptive and include specific examples. Electronic completion and transmittal is recommended so that all comments will appear on the same form at the conclusion of the process.
- The reviewer solicits input from the agreed upon individuals, requesting that input should be given prayerfully, honestly, and in a supportive tone.
- The reviewer then provides his or her comments on the performance, and includes comments from others giving feedback. Again, comments should be descriptive and include examples.
- The form is then returned to the person being reviewed prior to a face to face meeting.

**3. Review Meeting**

- The Senior Warden and clergy person meet in a location conducive to open dialogue for a period of about one hour.
- Discuss all elements of the review to ensure that both individuals have an opportunity to express their perspectives on the work being reviewed. It is not necessary for the two people to agree, but both should seek to understand the other’s perspective on the performance as well as development opportunities.
- Open the meeting with a reflection, prayer, a Psalm or some other reading that sets the discussion in a spiritual context.
- Either party may wish to modify comments or ratings as a result of the discussion. In that case, the document is re-sent and the final copy is signed.
- Both clergy and Senior Warden sign in the box on the final page, indicating that the review has been conducted. If there is not agreement, the clergy should check the box indicating disagreement.
- If there is significant disagreement, further input may be sought from a wider range of congregants or staff, a memorandum citing reasons for disagreement may be attached, the review may be escalated to a mutually agreed upon third party within the congregation or Diocese, and/or a request may be made for re-review in 3 to 6 months with the option to replace the current review if changes so warrant.

**4. Follow up**

- The Senior Warden and clergy person should agree upon the retention of any copies of the review. It is possible that a copy of the review could be kept by either the clergy person, the Senior Warden, or both. Also, an additional copy could be retained in a confidential or “sealed” file in the church office. This is a confidential document and should be treated as such.
- A follow-up meeting should be held 3 months after the review to discuss how things are going with regard to any agreements reached about support, development, educational opportunities, or desired changes.

<b>NAME OF PERSON BEING REVIEWED:</b>	<b>REVIEWER/S:</b>
<b>DATE OF REVIEW:</b>	<b>PERIOD UNDER REVIEW:</b>
<b>FOCUS OF WORK FOR THIS PERIOD:</b> (church vision, mission, values, goals, other goals for the period.)	



## Clergy Review Form

### Section 1: Job Responsibilities

**Key Job Responsibilities** are described below. This list should be reviewed with the person being reviewed and the reviewer, and agreed upon prior to writing the review. If any responsibilities are not appropriate to the individual being reviewed, they should be by-passed and other more appropriate responsibilities added. Only major responsibilities are expected to be review.

Rate each area on a scale of 1 to 4 and provide descriptive evaluative comments. Circle the rating that is appropriate based on this description:

- 4 =** an area of real strength, consistently achieves excellence in this area, well regarded
- 3 =** competent in this area, usually performs well, definitely meets expectations
- 2 =** performance is uneven, sometimes below expectations, and there is some need for development
- 1 =** an area needing significant improvement or attention, including outside development

	RATING			
<b>1. KEY RESPONSIBILITY: Liturgical Leader</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				
<b>2. KEY RESPONSIBILITY: Preacher</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				
<b>3. KEY RESPONSIBILITY: Pastoral care</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				
<b>4. KEY RESPONSIBILITY: Visioning, Leading Change, Developing Congregational Leaders</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				

<b>5. KEY RESPONSIBILITY: Managing / Developing staff</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				
<b>6. KEY RESPONSIBILITY: Administration /Fiscal Management</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				
<b>7. KEY RESPONSIBILITY: Involvement in Community, Diocesan, National, and/or International Activities</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				
<b>8. KEY RESPONSIBILITY: Christian Formation and Spiritual Direction</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				
<b>9. KEY RESPONSIBILITY:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				
<b>10. KEY RESPONSIBILITY:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Clergy Comments</u>				
<u>Evaluator Comments</u>				



## Clergy Review Form

### Section 2: Core Attributes

**Core Attributes** are described below. These should be agreed upon prior to conducting the review. These attributes describe how an individual carries out their responsibilities and works with others in their ministry. These characteristics point to the expression of underlying faith, values, and virtues desired in clergy. Items may be added in the open boxes to reflect the core values of the particular congregational community and/or rector. Again, each item is both commented upon and rated.

These items are discussed and rated from 1 to 3 as follows:

**3** = Strongly and appropriately evident in most situations

**2** = Sometimes evident but may not be completely appropriate or consistent

**1** = Little in evidence, would like to see more

**1. CORE ATTRIBUTE: Spiritual Model.** Provides a spiritual perspective on all things. Models prayer as a daily practice. Takes time for spiritual growth and development through retreats, spiritual direction, and other avenues. Expresses enthusiasm when speaking about his or her personal faith. Nurtures spiritual growth in others.

1	2	3
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Clergy Comments

Evaluator Comments

**2. CORE ATTRIBUTE: Community Builder.** Understands the importance of building community within and beyond the congregation. Engages people in many different aspects of the congregational life. Builds a sense of community among staff, vestry, and other groups. Seeks and welcomes newcomers. Interacts with the larger community outside the parish/mission. Within the community, gives credit to others when credit is due and encourages accountability.

1	2	3
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Clergy Comments

Evaluator Comments

**3. CORE ATTRIBUTE: Interpersonal Relationship Cultivator.** Builds and maintains interpersonal relationships with trust and mutual respect among staff, vestry, congregation, and larger community. Works comfortably and sensitively with a wide variety of people (age, sex, race, and socio-economic level). Maintains appropriate boundaries with others. Deals with complaints, concerns, and suggestions in a timely and effective manner. Handles conflict appropriately, neither escalating nor suppressing.

1	2	3
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Clergy Comments

Evaluator Comments

**4. CORE ATTRIBUTE: Communicator.** Communicates plans, information, and decisions in a timely and appropriate manner. People in the congregation generally feel well-informed. Uses a variety of media for communication, including in-person talking, print media, and computer-based media. Is open and non-defensive in communication style. Listens effectively and in a way that encourages others to be open. Maintains confidentiality.

1	2	3
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Clergy Comments

Evaluator Comments

**5. CORE ATTRIBUTE: Self Steward.** Manages work load to ensure that necessary time off occurs regularly. Delegates to ensure that responsibilities and burdens are shared. Participates in a support group on a regular basis. Takes time for hobbies, recreation, and rest. Is engaged in at least one area of learning or development, whether formal or informal. Continues reading and learning on church-related and other interests.

1	2	3
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Clergy Comments

Evaluator Comments

**6. CORE ATTRIBUTE:**

1	2	3
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Clergy Comments

Evaluator Comments

**7. CORE ATTRIBUTE:**

1	2	3
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Clergy Comments

Evaluator Comments

**NOTE: This section may include other attributes important to the congregation, individual, or situation. Here are some examples:**

- Comfort with / stimulant for change
- Focus on quality / excellence
- Compassion
- Innovation/initiative
- Resiliency
- Self-direction
- Planner
- Problem solving
- Sense of urgency
- Calming / Stabilizing



## Clergy Review Form

### Section 3: Development and Enhancement

This section of the form is provided for the documentation of agreements on any areas for development, strengthening, or continued use of a capability. Describe below summary conclusions based on other parts of the review, including specific actions to support any areas of enhancement. The support needed should be specified, including financial, training, or feedback. This section may also identify new areas of exploration that are of interest to the clergy being reviewed. It is recommended that no more than 3 areas be highlighted, and less is more likely to get the necessary attention.

**AREAS OF STRENGTH:**

**AREAS FOR DEVELOPMENT:**

ACTIONS AND COMMITMENTS	WHO WILL DO THIS	BY WHEN	BUDGET COMMITMENT

**SUMMARY of overall impact in review period.**

**REVIEWER:** \_\_\_\_\_ Date: \_\_\_\_\_  
*signature*

**CLERGY:** \_\_\_\_\_ Date: \_\_\_\_\_  
*signature*

I AGREE WITH THIS REVIEW IN GENERAL.

I DO NOT AGREE WITH THIS EVALUATION AND WOULD LIKE IT REVIEWED BY \_\_\_\_\_ . (Please attach a description of points of disagreement.)