

# An Introduction to Pastoral Reviews

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## Important Considerations

- Pastoral reviews should be **proactive, formative**, processes aiming for health and improvement, not reactive, summative processes. They will not be formative if they are tied to re-appointment decisions.
- In keeping with the above principle, pastoral reviews should be a **normal part of the rhythm** of the church e.g., annually.
- There should be an **agreed upon process** and time frame for the review process that is affirmed and known by the pastor, leadership and church.
- The review process should provide a **constructive** means of feedback and appropriate accountability in areas of change and growth.
- Unrest, dissatisfaction, disagreement, conflict or terminating a pastor's tenure **should never be the reason** for conducting a review. Consultancy or mediation are required here.
- A healthy pastoral review process will be **sustainable**. That is, it will not be so onerous that it can't be maintained due to the demands it places on the church.
- A healthy pastoral review process can serve as a '**pressure relief valve**' to work through issues before they build up to dangerous levels.
- Proactive, formative pastoral reviews will consider both **professional and personal** development, along with team dynamics and implementation of the Vision of the church.
- Pastoral reviews should be based on the person's **Role Description and any mutually agreed goals** for the period that is being reviewed. If there isn't a clear and agreed Role Description, the review process should be delayed and the focus move to establishing a clear and agreed Role Description. Review process recommences 6-12 months after the establishment of the Role Description.
- Pastoral reviews should be undertaken by an **appropriate group of people**.
- Pastoral reviews should form part of a **broader commitment** that includes the regular review of both the church's wider leadership team and the life of the church itself.

A **policy document** *should be developed that outlines:*

- Review goals
- Review group (including how it should be formed)
- Review process
- Review report

Templates are available in the Pastoral Review Package.

**Review Team** *It is recommended that the Review Team:*

- includes 3 spiritually mature men and women who are capable of dealing with confidential information, are aware of the importance of process, and have been nominated and appointed by the leadership team in negotiation with the person being reviewed.
- should include the staff member's direct supervisor, if relevant.

- includes at least one agreed member of the church governance or oversight group, e.g. an Elder.
- takes care to avoid a conflict of interest, e.g. family member on review team

**Review Process** *A good review process will:*

- be careful to gather **appropriate data** using carefully considered tools.
- provide opportunity to explore both **professional and personal** issues.
- provide opportunity for a pastor's **spouse** to be heard in a safe and confidential environment.
- be based on **Role Description and any goals** set for the period being reviewed.
- include the **setting of goals** for the period that will become the subject of the next review.

**Review Cycle** *The BA Church Health Team suggests:*

- a review cycle that covers **two years**, alternating between a focused 360-degree review and a simple review, *or*
- a review cycle that covers **three years** with simple reviews being undertaken in years one and two, and a broader 360-degree review in year three.

**Review Tools**

**a) a simple review**

- will at a minimum involve a conversation with reference to Role Description and any ministry and personal goals set for the period in question. Even a simple review conversation should touch on spiritual and family well-being (including financial and accommodation provision)
- a summary of key outcomes should be reported as appropriate to the leadership team and church

**b) a limited 360-degree review**

- use the review form for Pastors, to gather relevant information from the person being reviewed. A member of the Review Team may then wish to meet with the person being reviewed to discuss their feedback at this point.
- may use the *Pastoral Review and Feedback Form for Congregants* to gather relevant information from perhaps six key stakeholders including the Review Team, e.g. team leader, direct report, member(s) of the congregation, member of the lay leadership team – aiming for diversity, and at least some of whom will be different to the reviewers in previous cycle.

**c) a more comprehensive 360-degree review**

- this may be more suited to larger churches
- the key difference here is that feedback will be drawn from a wider group of people, e.g. potentially all the staff team, more representatives across the congregation(s).

**d) other tools** should be used at anytime, as appropriate, including the following options:

- to assist in evaluating self-care: *10 Self Care Strategies* and/or *Burnout Inventories*. To be undertaken and provide input into the Review Reports only if relevant and permission gained.

The main purpose of any self-care assessment is for personal feedback and development. Nothing would be reported without prior permission from the pastor.

- to assist in evaluating leadership skills: *Leadership Practices Inventory*
- to assist in holistic personal spiritual development: *Personal Vitality Plan*
- for further specific input from peers of the person being reviewed: *Peer Feedback Form*

### **Review Report** *A good review report:*

- will provide **constructive feedback** to the person being reviewed. It will highlight what they are doing well and ensure all recommendations relating to areas for improvement are supported by relevant resources.
- contains **professional and personal goals** for the coming 12 months. These are agreed by the person and the Review Group. These goals will then form part of the next annual review.
- will identify how others will take **shared responsibility** for goals that are set.
- will NOT try to cover all possible areas for growth and development, but will choose 2-3 areas for focus. Each report is part of a **formative process** that will continue in future years.
- will **report relevant information** to the church's governing group and to the congregation (see below on confidentiality).

### A note on **confidentiality** and Review Reports:

If the aim is to ensure a 'formative' process, it is best if the review report is owned by the Pastor. This means that while there will usually be prior agreement that a report will go to the governance group and also the church, there needs to be discussion and agreement with the person being reviewed about what goes into those reports. Transparency engenders trust but an increasing degree of 'generality' is likely to be appropriate perhaps for the governance group and then more likely for the church, with some matters or details best kept for the person being reviewed and/or governance group. If there is prior agreement that the reports will be released in full to the governance group, then particularly sensitive feedback may best be reserved for a separate and confidential letter to the person being reviewed.

### **Review Interview** *between the review team and the person being reviewed:*

- the **review report** will provide the main point of reference for the interview. It will be provided to the person being reviewed 2 or 3 days before the interview.
- will include **storytelling and sharing** around the encouragements, challenges and concerns of ministry and life. It can include discussion around: '*what would you like more of from me? what would you like less of? what would you like me to keep the same?*'
- allows draft **recommendations and goals** to be discussed and agreed with adjustments if needed

### **Spouse Interviews**

Review time can provide a valuable opportunity to offer an informal interview with the spouse of the person being reviewed. This can happen at any suitable time during the process. It is important that it is understood such interviews:

- are completely voluntary
- are NOT for the purposes of 'reviewing' the spouse
- are primarily to give the spouse a 'voice' on any matters desired in relation to life and ministry in the church
- are treated with the utmost confidentiality. Any feedback from the interview to the leadership team is only with the prior specific permission of the spouse
- may include one 'interviewer' (e.g. agreed and trusted governance team member) and one trusted support person for the spouse

Possible questions to guide the conversation may include:

- *What is life giving for you and your family in life and ministry here at [this] church?*
- *Where are the points of stress or tension or disappointment?*
- *What changes might you suggest, to make life and ministry at [this] church as healthy and life-giving as possible for yourself, your spouse and your family?*
- *Is there anything that you would like fed back to the leadership team?*
- *Anything we haven't asked that you would like to address?*

### Monthly Catchups

Alongside Pastoral Reviews, monthly catchups are recommended as part of an overall commitment to proactive, formative support for those in ministry.

- the **purpose** is to provide a proactive process to support the psycho-social well-being of pastors (and potentially other staff members). To help identify any concerns earlier rather than later so that adjustments can be made before major problems develop. It demonstrates due diligence and care on the part of the church / governance group / supervisor.
- **suggested approach** is for a church's governance team to ensure that a responsible person has a monthly catch-up with the sole/senior pastor and that the senior pastor/relevant line manager do the same with their direct reports e.g., senior pastor meets with associate pastor; youth pastor meets with youth intern; etc;
- these meetings should be **documented**. Notes are available at any time to the pastor / person being offered the catch-up. These notes can inform the self-care / well-being element of the review process.