

Mutual Ministry Review and Performance Reviews

Introduction

Mutual Ministry Reviews and Performance Reviews are two separate, but related, processes. The **mutual ministry review** is designed to occur after the first six months of a new ministry and annually thereafter. The purpose of the mutual ministry review is to examine the partnership between clergy and laity. It is designed to assess how the parish is doing. It is a time to celebrate what has been done well and to understand what might be done better. The focus is on the common ministry engaged in by the whole parish community. The starting point is often the vestry/rector relationship, but in some forms it can include a congregational survey or contributions from representative constituencies within the congregation. The mutual ministry review should be facilitated by a congregational consultant from outside the congregation. Materials relating to mutual ministry reviews are available on the diocesan website.

A **performance review** may be defined as a periodic review of an individual's performance in an assigned position, measured against defined job duties. The aim of a performance review is to clarify job responsibilities and job expectations. The review evaluates performance against established criteria and suggests ways that performance can improve. In the church context, the aim is to develop the unique ministry of the priest and to provide the opportunity to identify development opportunities for skills enhancement and spiritual deepening. The review is conducted by a performance review team drawn from persons within the congregation.

How are they related?

The mutual ministry review focuses on the way the rector and vestry work together **as a team** to achieve the goals of the parish and to fulfill the mission of church. The rector's performance review focuses on the **individual** gifts and skills that she/he brings to the parish.

Properly constructed, the mutual ministry review should result in the members of the vestry and the rector understanding what each must do, working together. It should not focus on what the rector **alone** should do, but what they are to accomplish as a cooperative unit.

Both types of review should be built on a foundation of trust and conducted in an atmosphere of constructive input. Ideally, an outcome of the mutual ministry review is an agreed plan for the future that includes some specific goals. These goals provide the framework for the individual goals that are assigned to both the vestry and the priest. Each understands what their role is for the attainment of the objectives. At the end of a mutual ministry review it should be possible for the priest and vestry to determine where effort needs to be spent, what the roles and responsibilities of the parties (clergy, vestry and congregation) are, and what the priorities are for the next review period.

Mutual ministry review \Rightarrow Parish Goals

Parish Goals \Rightarrow Vestry goals and Clergy goals

Characteristics of a positive performance review:

- Conducted in a supportive climate to help clergy deal with the personal dimensions that may arise in discussion of elements that are integral to their work.
- Based upon objective criteria and pre-established goals.
- Provides opportunity for give and take in discussion.
- Results in clear, measurable expectations and action plan.
- Provides opportunity for individual development and ministry skills enhancement through use of resources such as the continuing education budget or agreed upon time for study.

Reasons to conduct a performance review:

- A time to recognize and celebrate what is going well.
- Identifies what needs to be changed in a constructive manner.
- Provides clear and reliable feedback
- Strengthens relationships by sharing information
- Minimizes/eliminates unrealistic expectations
- Renews personal goals.

Steps to be taken:

- Develop a process that fits the style and composition of the parish.
- Involve the priest from the beginning
- Form a team to conduct review
- Collect relevant information – current, typical, specific and attributable.
- Encourage the priest to engage in self evaluation and discernment of ministry.
- Share findings and arrive at conclusions
- Agree upon specific measurable objectives for the next review period
- Summarize conclusions for vestry
- Engage vestry support in the action plan as appropriate.

Performance Reviews and Clergy Compensation

The Diocese of Newark recommends that clergy should receive an annual merit review to determine if a salary increase is warranted. The performance review is one element in determining the appropriate increase percentage. Other factors to be considered include the relationship of current compensation to the average compensation provided within this Diocese and surrounding dioceses, scope of position and length of service. The Church Pension Fund publishes an annual report with compensation information by church size in each diocese which can be found at www.cpg.org/research. Compensation comparisons for dioceses surrounding Newark can be found on the last page of this document.

The Diocese provides guidelines on the recommended percentage increase that equates to different levels of performance. Effective January 1, 2011 the recommended increases are as follows:

Performance Assessment	Merit Increase Guidelines
Outstanding	4% to 7%
Very Good	2% to 5%
Satisfactory	Up to 3%

Suggested Performance Review Approaches

The performance review process and the forms used to record the process should be chosen to fit the style of the congregation. Ideally, the review should not be burdensome to complete and the approach should be agreeable to all parties concerned.

The following models have merit and vary from the simplest format to a more complex, comprehensive format. Each congregation should select the approach that suits them best and that provides a sustainable method so that the annual review becomes easy to administer.

1. The Diocese of Florida has a document that covers both mutual ministry and performance reviews including the philosophy behind reviews. The document may be found at <http://www.diocesefl.org/index.php?mod=mutMinReview>.
2. The Diocese of Texas has a Clergy Performance Review form that is quite user friendly. The form may be found on the Diocese of Texas website: www.epicenter.org, under Diocese/Forms.
3. The attached form was developed in the Diocese of Newark and is the most basic approach.