

## 2021 CLERGY GOAL SETTING AND SELF-REVIEW

How on earth is anyone supposed to take stock of this past year?! And why would we want to? Better to just let it go, right? Not at all. Tough times are tempering times (Romans 5:3-5), and it behooves us to learn all we can from this year—about ourselves, our churches, our mission—while accepting the gift of grace in the process.

The Mountain Sky Conference is still revisiting the annual review process, with the goal of adopting a helpful and holistic assessment tool. This is, though, clearly not the year to introduce something new. You'll hear more about what's ahead in coming months. For now, utilize this tool (revised from last year) to review the year in ministry with your SPRC team, and glean wisdom from the journey you've been on together. It is expected that you will take this review seriously, but don't lose sleep over it. Let it be a framework for constructive reflection.

This review intends for you to take the extraordinary nature of the past twelve months into account. In addition, your setting is unique to you and should be incorporated in your review: Elder, Deacon, LLP, or Lay Supply; senior or associate; large or small; urban or rural; single or multiple point; full or part time. The categories also tilt heavily toward pastoral ministry in a local church setting. If you are in a different setting, it is expected that you will interpret these categories as best fits your context. This instrument provides a guide. You know your situation and how you and your people have managed the last twelve months.

There is space for both quantitative (1 to 5) and qualitative (written) feedback. Reflect on each of the nine categories. Detailed descriptions are available in the appendix following this instrument if you would like further explanation or suggestions as to what a particular category is looking for. Comment as appropriate and rate your ministry 1 to 5 or NA according to the following rating system. As you do so, feel free to add "...given a worldwide pandemic, toxic political climate, and societal racial reckoning" to the description of each number:

- 5 Exceptional Performance, extremely fruitful
- 4 Consistently Exceeds Expectations
- 3 Fully and Consistently Meets Expectations and goals
- 2 Improvement Needed in some areas
- 1 Underperforming, well below expectations
- NA Not applicable/Not known/Insufficient information to score

S.M.A.R.T. goals allow us to highlight particular areas of attention for the coming year, then later to reflect on our effectiveness in achieving those goals. Basic instructions may be found in the appendix. If you are unfamiliar with this form of goalsetting, there are resources available to help you write them (contact your district office). We set these goals based on the world we can see. As unsettled as that world is, it is still important to name some achievable targets, fully expecting to adapt as those targets move.

Please share this completed form with your SPRC after that team has completed its review of your and your church's ministry using the *SPRC Review of Ministerial Effectiveness and Goal Setting* form. This is an opportunity for open discussion of how you and the church, together, are making disciples and transforming the world. Together you can develop a plan of action to address both your needs and the needs of your church family as you emerge from the pandemic. May God bless you in this important work.

**Completed forms should be signed and turned in to the district office by June 4<sup>th</sup>, 2021.**

To be signed upon completion and following sharing between pastor and SPRC:

Clergyperson's Signature \_\_\_\_\_ Date \_\_\_\_\_

SPRC Chairperson Signature \_\_\_\_\_ Date \_\_\_\_\_

DS Signature \_\_\_\_\_ Date \_\_\_\_\_

## **I. MINISTERIAL RATING**

{Feel free to use as much space as you need for written comments.}

**1. Spiritual Formation & Personal Care** Rating [    ]  
Comments:

**2. Preaching & Teaching** Rating [    ]  
Comments:

**3. Leading the Congregation in Passionate Worship** Rating [    ]  
Comments:

**4. Equipping Laity for and Participating in Missional Engagement** Rating [    ]  
Comments:

**5. Equipping Laity for and Engaging in Radical Hospitality** Rating [    ]  
Comments:

**6. Leading Laity in Intentional Discipleship and Extravagant Generosity** Rating [    ]  
Comments:

**7. Leading the Congregation, Staff & Lay Leadership** Rating [    ]  
Comments:

**8. Interpersonal Skills** Rating [    ]  
Comments:

**9. Connectional Matters** Rating [    ]  
Comments:

## **II. COMPARE, CONTRAST, and COLLABORATE:**

As you look to discuss this review with your SPRC team, where do you find your strengths and areas of growth to fit, or not, the congregation's strengths, needs, and desires?

How can you and the leadership of the church work together to ensure fruitful collaboration and distribution of accountability between the congregation and pastor in carrying out your joint mission and ministry?

## **III. S.M.A.R.T. GOAL SETTING**

List at least three S.M.A.R.T.—specific, measurable, attainable, realistic, and timely (tied to a deadline)—goals YOU would like to achieve, with the help and/or support of the congregation, in the months and/or year ahead:

1.

2.

3.

## **IV. MARGIN MAKING**

What will you have to stop doing to achieve the goals you set (recognizing it is unrealistic to pile more on without thoughtfully and intentionally making space in one's life to focus on priorities)?

# APPENDIX

## SOMETHING TO THINK ABOUT AS YOU PREPARE FOR THIS REVIEW...

Pastors and congregations can sometimes be good at judging one another; blaming each other for shortcomings. An annual review tends to surface our critical side, rather than our aspirational side. What if we were to go into this review assuming the best of one another? What if we assume everyone, clergy and laity alike, has done the best we could with what we had to work with? This review should be an invitation to assess the whole of ministry—in a particular place, over a particular time, by a particular faith community, in collaboration with a particular spiritual leader—with an emphasis on the growth and next steps of all involved.

There is an acronym you and your SPRC may want to consider as you engage with the review process: **C.O.A.L.** Coined by Dr. Daniel Siegel in his work on mindfulness, it might be a useful tool for you and your SPRC team. Especially in a year like we've just come through, mindfulness may help us to foster resilience, as well as compassion with and for one another. This tool works for both personal and interpersonal reflection.

**Curious**—Enter this process with a seeking, rather than judgmental, spirit. As you look at the nine categories, draw on the Five Ws—Who? What? When? Where? Why? as well as How?. Examples of questions you might ask: Who sticks out, and for what reasons? What significant events occurred, and in what contexts? When was God particularly present, or seemingly absent? Where was grace practiced, or rejected, or forgotten? Why did we do this particular thing, or not do this other thing? How might we have approached this particular situation more faithfully? The point is to ask the right questions before rushing to answers.

**Open**—It is easy to approach this review with an agenda, or laundry lists of affirmations and complaints. How would it look if we were more receptive to the experiences of others and not just our own? We often speak of walking a mile in another's shoes, then fail to imagine what it might truly be like. There are countless emotions experienced by pastors, church members, and others in our communities that impact ministry and help explain why we do what we do. This review is an opportunity to open our hearts and minds to see beyond first impressions, free from the need to immediately judge.

**Accepting**—The phrase “it is what it is” has fallen out of favor lately, but there is often some truth to it. Getting bogged down in arguments about the reasons things didn't work can distract from the simple fact that they didn't. Dwelling on what might have been is a sure fire way to get stuck. Acknowledging reality and the necessity to be right where we are allows us to put yesterday to bed and look forward to tomorrow. Awareness of how we feel about a particular situation allows us to identify the values behind those feelings. Those values, rather than the emotions themselves, can point the way forward.

**Loving**—It would be nice if this went without saying, but kindness, compassion, and empathy should be guiding lights throughout this review. No one is harder on pastors than themselves. They heeded a powerful call on their lives and do their best to live it out faithfully and well. The same is true for the members of a congregation. They do their best to live up to the expectations of disciples of Jesus Christ. How often must Jesus look at all of us and recall his words from the cross: “forgive them, they know not what they do?” In this review, you have the opportunity to make love the watchword in your conversations, in crafting every response, and embracing one another in the grace and truth of the gospel.

## **RATING SCALE ELABORATION**

Feedback following last year's review included frustration with the amount of detail and number of questions included under each of the nine categories. There were, though, also many who appreciated the elaboration. The compromise is to include that material here, instead of in the body of the review. Take it or leave it. Use it or don't. If it is too much, stop reading now and go back to the categories themselves. But if you're not sure what a particular category is asking for, and an interpretation pertinent to your setting doesn't come readily to mind, the following is here for your edification. Again, please incorporate throughout this review the ways COVID has either held you back, stretched you to new places, or both.

Remember, the materials connected with this review are not just about evaluation and assessment. Every pastor and faith community has blind spots and areas ripe for growth. Some of these questions and reflections may be seen as aspirational, or suggesting areas to consider going forward.

### **1. Spiritual Formation and Personal Care**

A pastor's vocation requires a commitment to lifelong learning, self-care, and deepening faith.

Reflect on your devotional life. How do your spiritual practices guide your ministry?

Share your practices related to personal health and self-care (physical, spiritual, emotional, relational, and financial health).

How do you maintain a balance between your personal/family time and ministry demands?

Share your involvement in any peer or covenant groups and their value to your ministry.

### **2. Preaching and Teaching**

Consider how your sermons reflect thorough preparation and make Christian teaching relevant to people's daily lives.

In what ways are your sermons prophetic and challenging?

Are your sermons well organized, with listeners able to follow central ideas?

How do you demonstrate a commitment to the Christian Education needs of Children, Youth, Younger Adults (18-39), Adults (ages 40 plus), and Older Adults?

Do you provide active leadership in the teaching ministry of the church?

How effective are you in your written and verbal communications?

### **3. Leading the Congregation in Passionate Worship**

Some congregations can be described as the "frozen chosen," as opposed to making a joyful noise to the Lord and leaving a service inspired to be the hands and feet of Jesus in the community. Passion for God need not be loud, but it should run deep.

Reflect on how you seek to craft worship that focuses on and leads people to encounter God.

Do you regularly study worship attendance compared to previous years, and share this data with leaders and the congregation with an eye toward inviting more people to engage with the Word and Sacraments?

How do you involve others in the planning and undertaking of worship?

What weekly and/or occasional worship services and devotional times have you planned and led this last year?

How do you lead the congregation to follow up with visitors?

### **4. Equipping Laity for and Participating in Missional Engagement**

A pastor is to assist the laity in recognizing how Christ has equipped each of us for our roles in the church (Ephesians 4:11-13).

Reflect on how well you share leadership, decision making, responsibility and accountability for ministry with the laity.

In what ways do you assist laity in discovering their spiritual gifts and how to live them out?

In what ways do you encourage service and outreach in the local, national, and global community?

How do you intentionally involve laity in mission and ministry?

How well do you encourage and support connectional United Methodist outreach through such ministries as General Board of Global Ministries (GBGM), and United Methodist Committee on Relief (UMCOR)?

How much time do you spend outside of the church in a “third” place (other than home and church) in the community where you can connect with “nones” and “dones” (those who have left church or never been a part of one)?

In what ways are you connected in the community?

How, and how well, are your people connected with the “least, last, and lost” of your community?

Have you encouraged and supported a church/school partnership or other innovative forms of ministry?

### **5. Equipping Laity for and Engaging in Radical Hospitality**

Jesus repeatedly shows us what it means to be “all in” for those who are “out.” Some churches are little more than social organizations for like-minded people. This category pushes into uncomfortable territory for some of us.

In what ways do you intentionally model reaching out to people in the community and invite them to worship or another form of engagement with your church family?

Reflect on your effectiveness in leading Confirmation and New Member classes.

Professions of faith tend to be low in many churches. How effective have you been in talking to, praying with, and/or building relationships with people who may be led toward a commitment to Christ?

In worship, teaching, and by example, how have you challenged the congregation to form relationships with people outside the church and to invite people to visit or otherwise engage with the church? What fruit have you seen from these efforts?

In what ways do you lead the congregation in intentional faith sharing ministries such as prayer walks, servant evangelism, or other ministries?

How do you assist the congregation in providing a welcoming environment for people who are new to faith?

### **6. Leading Laity in Intentional Discipleship and Extravagant Generosity**

In what ways are you intentional—and transparent with the congregation—about deepening your personal theology, developing practical skills for ministry, and strengthening your leadership skills?

Reflect on how you encourage intentional discipleship as a priority for every Christian. In what ways do you ensure that the congregation has an intentional and well-articulated discipleship/spiritual formation process?

Do you ensure that the congregation offers classes/groups for those new to the Christian faith?

Reflect on your practice of setting the example of inviting newcomers to church to connect with small groups, classes or other means of discipleship formation.

Describe how you have led the congregation in an annual/regular/occasional/ongoing stewardship focus that emphasizes extravagant generosity as a response to God’s extravagant generosity towards us.

Do you lead by example in giving a tithe of ten percent or more to God’s work through the church?

### **7. Leading the Congregation, Staff, and Lay Leadership**

Describe the process you have used to develop a shared vision with the congregation and reflect on how you have helped them stay focused on that vision. What is that vision?

How effective are you in team building and leading people through change?

What is your process for helping the congregation evaluate the ministries of the church and assess the need for new ones?

In what ways do you help the congregation, and specific ministry teams, achieve their goals?

How effective are you in clearly stating expectations for each staff member or the lay leadership and encouraging them in the accomplishment of their goals?

How do you deal with conflict within the staff or lay leadership when it occurs?

How effective are you in handling conflict?

When are you available to staff or lay leadership and do you have regular meetings with them? How effective are these meetings?

## **8. Interpersonal Skills**

Evaluate your relationships with people. Are they caring and compassionate?

How effective are you in relating one-to-one with members of your congregation and staff?

How effective are you in relating in a group?

Are you willing to listen to different points of view?

Reflect on how you use grace and good judgment in working with people.

How effective are you in caring for the pastoral needs of the congregation through calls, visits, or the delegation of meeting such needs to an equipped lay team?

## **9. Connectional Matters**

The United Methodist Church is a connectional denomination. That is, each congregation is bound to several hundred congregations in the Mountain Sky Conference and thousands of other congregations around the world. We share a common set of doctrines and practices, rather than each local church acting on its own. United Methodist congregations and clergy are expected to support and participate in this connection, which makes possible many missional objectives that would be difficult or impossible alone.

In what ways do you maintain a collegial spirit with other clergy?

Reflect on your involvement in ecumenical or interfaith work.

In what ways do you support and participate in the work and activities of the District, Conference, and General Church?

Are you well prepared for the yearly Charge Conference and year-end reports? Are they completed, in order, and on time?

Reflect on your appreciation and understanding of the doctrine and polity (rules of the church) of the United Methodist Church.

Has your church paid its Apportionments and Conference obligations in full? If not, please explain.

## **11 TIPS FOR CRAFTING S.M.A.R.T. GOALS**

To improve **GOAL SPECIFICITY**, consider:

1. **“What” Targets:** What specific job activities will you improve? What is the visible outcome others will see in your congregation or community when you succeed?
2. **“Who” Targets:** What specific relationships will you improve? Who is the target population or audience?

To improve **GOAL MEASURABILITY**, consider:

3. **Monitoring Flags:** What milestones, deliverables, or results will confirm your progress? What question can you ask yourself to inspire accountability?
4. **Future State:** What will success look like? After months of effort, what beliefs will congregation members hold, what will be happening, what moments or interactions will be noticeable?

To improve **GOAL ATTAINABILITY**, consider:

5. **Progression:** What is the series of milestone accomplishments that can happen one at a time to create momentum?
6. **First Commitment:** What is the immediate first step that will get the ball rolling? What needs to happen to prepare and take that step? Who can help?
7. **Resources:** Whose inputs of time and energy are needed to truly accomplish your vision for this goal? Can we confidently enlist and commit those resources? Think about: Frequency, Persistence, Consistency, Intensity, and Innovativeness – these are all possible options to energize a goal and make outcomes achievable. Is a team effort needed?

To improve **GOAL REALISM**, consider:

8. **Importance:** Why does it matter to achieve this goal? How will it forward your Mission?
9. **Meaning:** What values does this goal embody and reflect? What will it mean about our identity serving the world if we are able to accomplish this goal?

To improve **GOAL TIMELINESS**, consider:

10. **Why Now:** How will accomplishing this goal create a positive moment in history?
11. **Under My Watch:** What is the opportune alignment to accomplish this goal in this congregation or community in collaboration with this congregation at this time?

NOTE: It is suggested that the SPRC Chair and Pastor review progress toward both the pastor’s and the congregation’s goals at least quarterly.