

# Appraisal: a British Experience

*Ministry Today 9: February 1997*

By Paul Beasley-Murray

I am committed to the appraisal process. From my experience of appraisal over a number of years I have come to believe that, properly handled, it is of great personal benefit, which leads in turn to benefit to the church.

My first experience of appraisal was within the world of higher education. To be precise, it was in my role as principal of a theological college that I introduced annual appraisals both for myself and for all other members of staff - both academic and secretarial. As is the norm when change is first instituted, the idea was initially resisted. However, my colleagues warmed to the idea of appraisal - not least when they grasped that the appraisal process promoted their own interests. Rightly understood, appraisal always has the development of the individual - as well as the institution - in view.

But appraisal within the world of education, as indeed within the wider world of business generally, is relatively straightforward when compared with appraisal within the church. The fact is that there is a number of complicating factors so far as ministers and churches are concerned. In the first place, most ministers have no job description. In the second place, most ministers do not work in a team, and - with the exception of associate and assistant ministers (curates and the like) - most are their own bosses. In the third place, in a voluntary association such as a church the 'performance' of the minister is inextricably bound up with the 'performance' of the church..

Nonetheless, on the basis of having myself undergone an annual appraisal within a local church context over the last three years - and having also set up appraisals for our assistant minister, youth minister, and church administrator - I can say with conviction that appraisal within a church context is still very much a viable and useful procedure.

Before embarking on the appraisal process, however, everybody concerned must be aware that ministerial appraisal, if it is to involve the church, is both complex and time-consuming. There are no short-cuts. For unlike most secular appraisal systems, which tend to involve a one-on-one encounter, ministerial appraisals can involve a large number of people.

Let me illustrate. In my particular setting we have felt it right to involve the whole leadership team, which in my church consists of fifteen deacons, three ministers, and a church administrator! It is true that some forms of ministerial appraisal dispense with appraisal from within the church, and instead may involve appraisal by a fellow minister ('peer review') or by a figure further up the church hierarchy scale ('line review'). Alternatively others prefer what is sometimes termed 'accompanied self-assessment', which normally involves another minister from outside drawing alongside the minister

being appraised. However, from my point of view, there are great disadvantages in involving only people from outside the church. Such outside 'consultants' do not normally have first-hand experience of the ministry in question. To a large extent they are dependent upon what they hear - as distinct from what they see. People within the church, however, experience the ministry at first hand on a weekly basis. On the other hand, few if any people within the church have first-hand experience themselves of ministry and therefore do not always understand the peculiar pressures ministers often live under. Furthermore, some (but certainly not all) may lack theological insight into the various tasks and challenges of ministry. For this reason, I believe there is much to be said in involving an outside ministerial 'facilitator' to share in the appraisal process along with the 'lay' leaders of the church. Inevitably, however, bringing in an outside facilitator adds to the complexity of the process.

What shape does such a full appraisal process take? In my experience appraisal of the senior minister has involved nine steps:

- 1. The selection of an outside ministerial 'facilitator' and a group of two or three 'representative' lay leaders.** With regard to the latter 'representative' group, although all my leaders are invited to contribute to the process by filling in questionnaires, it clearly is not realistic for the minister to engage in what can be quite a delicate conversation with a large group of people;
- 2. The design of a questionnaire,** which has to be owned by all, minister and church leaders alike;
- 3. The completion of the questionnaire** by 'lay' leaders and church staff on the one hand, and by the minister on the other. Ideally such questionnaires should not demand more than an hour of one's time, although in practice I have found it has taken considerably more time;
- 4. The exchange of questionnaires.** Initially and at my request the representative church leaders simply summarised for me the responses. At first I did not feel I could cope with reading 18 different assessments of my ministry. However, I have come to realise that there is a lot to be said for openness - not least because my fellow leaders tend to be incredibly affirming in their comments. Nonetheless, we have felt it right to give freedom to those reviewing me to make confidential 'off the record' comments to the representative church leaders. In my case this option has not, so far, had to be taken. But it is there as a safeguard;
- 5. The dispatch of all the questionnaires** to the outside facilitator;
- 6. The day of the appraisal itself.** We start together with a cooked breakfast (the very first time round it felt like the condemned man's last privilege!) and then set to work for the next four hours. In the afternoon an opportunity is made for me to have a private one-to-one conversation with the outside facilitator;

**7. The drawing-up of the report on the appraisal**, which requires the agreement of all parties involved. The first two years the outside facilitator was responsible for drawing up the report, but this last year one of my deacons was responsible;

**8. The reception of the report by the leadership team as a whole**, in the light of which various decisions and actions may be taken;

**9. Regular review during the year** (once a term, ie three times a year) in order to monitor progress against the agreed targets and to deal with any difficulties on an ongoing basis.

Ministerial appraisal can certainly be time-consuming. Indeed, on occasion I have felt somewhat guilty about the demands appraisal makes on my 'lay' leaders, most of whom live extraordinarily busy lives. Yet, precisely because care and time are taken, the exercise proves exceedingly worthwhile.

Fortunately the process with other members of the church staff is somewhat simpler. In the first place, since I as senior minister am involved, we do not feel it necessary to involve an outside ministerial facilitator. Secondly, we are spared design time for the questionnaire, since that used for the others is modelled upon that used for the senior minister. Thirdly, although all members of the leadership team are invited to make comments, in practice they are not all involved; instead we ask for particular comments from five or six leaders who are deemed to have a particular interest in the area for which the member of staff is responsible. Fourthly, the working out of goals for the next twelve months for each staff member is linked to the goals of the senior minister, which in turn have been owned and accepted by the leadership team.

As has already been mentioned, we design our own questionnaires. Inevitably we have found ourselves learning from our experience of questionnaire design, with the result that each year the questionnaire has taken different forms. For 1996 we asked the following questions:

### **1. Statement of job purpose**

Highlight up to six of the most important areas

### **2. Review of last year's objectives**

What were the three main achievements last year (qualitative and quantitative)?

What areas could have been more effective (qualitative and quantitative)?

### **3. Review of development**

What learning has taken place and how is it being applied (benefits to the minister, the leadership team and the church)?

What can be done to improve performance - by the minister and by others?

#### **4. Planning the coming year's objectives**

What are the priority areas of work during the next 12 months? These will link with objectives

of the leadership team and of church. Nb. draft objectives for discussion should be precise,

measurable, achievable, results oriented, and should include a timescale.

#### **5. Standards of performance**

What standards of competence will match the agreed objectives and/or development needs? Nb. be specific and set performance criteria.

#### **6. Development plan**

What development opportunities are required to support the achievement of

(a) the minister's objectives within the current role?

(b) the minister's aspirations for further long-term development (personal/ professional)?

#### **7. Other comments**

Are there other comments which you wish to express privately?

When I have talked to fellow ministers about the appraisal process and shared with them something of what we do, I normally find I come up against such comments as 'This smacks too much of the world'; 'We are not in the business of being successful'; 'Management tools impose unhealthy values upon the church'. My experience of appraisal runs counter to such objections. My leaders realise that there are limitations to evaluating any ministry - at the end of the day God alone is judge. Certainly, they know that numbers are not the be- all and end-all. On the other hand, Jesus has much to say about the need for his followers to be good managers ('stewards'). There is a place for sitting down and asking searching questions about ministry. My own conviction is that we ministers can be far too jealous of our independence. Although the House of Lords in its ruling of 1986 *Davies v Presbyterian Church of Wales* may be correct in stating that a pastor's 'duties are defined and his activities are dictated not by contract but by conscience', there is something to be said for ministers having to give an account of their ministry to the church. For me, at least, such a giving of an account is not threatening, but liberating. One of the chief benefits of appraisal for me is that I feel that my fellow leaders can understand more clearly how I perceive my calling, and how I struggle to fulfil that calling. In this respect I have found it very helpful to think through

my own personal ministry goals for the coming year - doing it with others has brought an extra degree of realism which otherwise I might not have had (the setting of too ambitious goals can prove disheartening). A further very positive benefit is that my fellow leaders use appraisal as an opportunity to express their appreciation of my efforts: for me therefore appraisal is an affirming experience. Yet another benefit is that within the appraisal process I have found a safe place to bring up some of my frustrations about what I perceive as some of the limitations imposed on my ministry by the church. To give a practical example, at one stage I was concerned that I did not have the right tools for the job: the upshot was that I was provided with an upgraded computer capable of using the particular programmes I felt I needed! And so I could go on. My experience of appraisal is that it is more than worth the effort.

**Revd Dr Paul Beasley-Murray** is Senior Minister, The Baptist Church, Victoria Road South, Chelmsford. He chairs the Board of Trustees of the RBIM and is editor of Ministry Today