



QUADRENNIAL T RAINING 2025

Performance Evaluation Responsibilities

Committee on Episcopacy Responsibilities

Book of Discipline



¶ 637.3

- The Annual Conference Committee on Episcopacy has several functions, but as it relates to Performance Reviews:
- To engage in annual consultation and appraisal of the balance of the bishop's relationship and responsibilities to the area and annual conferences, the jurisdiction, general Church boards and agencies, and other areas of specialized ministry, including, at all levels, concern for the inclusiveness of the Church and its ministry with respect to sex, race, and national origin, and understanding and implementation of the consultation process in appointment-making.
- To report needs for episcopal leadership to the jurisdictional committee on episcopacy through the duly elected conference members of that committee.

Confidentiality



- The work of this committee cannot be effectively accomplished without an understanding of the need for confidentiality and discretion in communicating with members of the annual conference outside the committee itself.
- It is recommended and expected that details and specifics of the committee's discussions (including the evaluation of the resident bishop) be considered highly confidential in nature and handled appropriately to maintain such confidentiality.

Meetings of the Conference Committee on Episcopacy



- The goal is to support and enhance the ministries of the bishops by providing maximum encouragement and immediate feedback.
- One example that has been used in the SEJ is that this will be done most effectively through using the 8 categories of the “Episcopal Review and Evaluation” instrument.

Use of Data



- The quarterly reports written by the coordinators of the evaluation process (the SEJ COE representatives) summarize the conversation between the conference COE and the resident bishop. (Perhaps only one or two paragraphs, although more may be needed as various issues arise.) In addition, quantitative results should be tabulated from the responses of the COE members to the categories of the “Review and Evaluation” collected in the first quarter of 2014 and 2015. The coordinators will collect these results and include them in the final review due in the fourth quarter, 2015.

Role of the Conference Committee on Episcopacy



- One of the most important roles of the COE as highlighted in #1 of the Performance Evaluation Examples is often overlooked. Committee members support the ministry of the resident bishop by interpreting to people in the area the magnitude of the bishop's job (§637.3,e). Committing to confidentiality in the process of review and evaluation (#2) is a minimal way of supporting the bishop's ministry. More positively, committee members should also interpret and explain the scope of episcopal responsibilities in The United Methodist Church to members of the episcopal area.

Responsibility of the Committee on Episcopacy



- “to establish and implement processes that provide, **at least once** each quadrennium, for each active bishop, a full and formal evaluation which will include self-evaluation, assessment by episcopal peers, and comment by persons affected by his/her superintendency (such as cabinets, lay leaders, directors of agencies served).”

Purpose of Episcopal Review & Evaluation



- Provide guidance and insight into effective episcopal leadership, and to enhance and support the ministry of the bishops. The Annual Conference Committee on Episcopacy is charged with the responsibility of working closely with the resident bishop and providing feedback on the various responsibilities of the bishop, detailed here in eight distinct categories.

Completing the Performance Review

Proposed Evaluation Questions



Ongoing Formation

- **1.1. Reflects the Christian faith in lifestyle and personal disciplines:** highly effective / effective / needs improvement
- **1.2. Enthusiastic and energetic:** highly effective / effective / needs improvement
- **1.3. Practices good relational skills (e.g. caring, friendliness, ability to listen, accessibility, fairness):** highly effective / effective / needs improvement
- **1.4. Cares for the body and mind as well as spirit and family life:** highly effective / effective / needs improvement
- **1.5. Takes the initiative to find and engage in ongoing learning opportunities:** highly effective / effective / needs improvement

Proposed Evaluation Questions



Administrative Responsibilities in Episcopal Area

- **2.1. Supports and guides mission of the Conference:** highly effective / effective / needs improvement
- **2.2. Encourages the development of future lay and clergy leaders:** highly effective / effective / needs improvement
- **2.3. Demonstrates commitment to inclusiveness:** highly effective / effective / needs improvement
- **2.4. Handles sensitive issues appropriately:** highly effective / effective / needs improvement
- **2.5. Promotes faithful stewardship and fiscal responsibility:** highly effective / effective / needs improvement

Proposed Evaluation Questions



Leadership

- **3.1. Grasps cultural context of the episcopal area:** highly effective / effective / needs improvement
- **3.2. Visionary:** highly effective / effective / needs improvement
- **3.3. Team builder:** highly effective / effective / needs improvement
- **3.4. Strategic thinker:** highly effective / effective / needs improvement
- **3.5. Builds trust and inspires respect:** highly effective / effective / needs improvement

Proposed Evaluation Questions



Preaching and Teaching

- **4.1. Faithfulness to Scripture and to the Doctrinal Standards of The United Methodist Church:** highly effective / effective / needs improvement
- **4.2. Preaches and teaches in diverse locations:** highly effective / effective / needs improvement
- **4.3. Clear and effective communicator:** highly effective / effective / needs improvement
- **4.4. Preaches and teaches for commitment and deepened discipleship:** highly effective / effective / needs improvement
- **4.5. Open to new trends in preaching and teaching:** highly effective / effective / needs improvement

Proposed Evaluation Questions



A p p o i n t m e n t M a k i n g

- **5.1. Practices and promotes consultation process (with pastors and churches):** highly effective / effective / needs improvement
- **5.2. Maintains objectivity and consistency:** highly effective / effective / needs improvement
- **5.3. Balances concern for pastors and churches:** highly effective / effective / needs improvement
- **5.4. Implements open itinerancy:** highly effective / effective / needs improvement
- **5.5. Balances the tension between itinerancy and healthy longevity in appointments:** highly effective / effective / needs improvement
- **5.6. Encourages open and honest dialogue within the cabinet:** highly effective / effective / needs improvement

Proposed Evaluation Questions



Building Relationships

- **6.1. Laity:** highly effective / effective / needs improvement
- **6.2. Deacons:** highly effective / effective / needs improvement
- **6.3. Elders:** highly effective / effective / needs improvement
- **6.4. Local pastors:** highly effective / effective / needs improvement
- **6.5. Clergy in extension ministries:** highly effective / effective / needs improvement
- **6.6. Deaconesses/home missionaries and diaconal ministers:** highly effective / effective / needs improvement
- **6.7. Cultural and ethnic groups:** highly effective / effective / needs improvement
- **6.8. Community groups and leaders:** highly effective / effective / needs improvement

Proposed Evaluation Questions



Articulates and supports the initiatives of The UMC

- **7.1. Launches new churches:** highly effective / effective / needs improvement
- **7.2. Transforms existing congregations:** highly effective / effective / needs improvement
- **7.3. Encourages development of clergy and lay leadership:** highly effective / effective / needs improvement
- **7.4. Addresses poverty in community with the poor:** highly effective / effective / needs improvement
- **7.5. Advocates for improved global health:** highly effective / effective / needs improvement
- **7.6. Teaches the Wesleyan model of making and forming disciples:** highly effective / effective / needs improvement
- **7.7. Focuses on children and youth:** highly effective / effective / needs improvement
- **7.8. Embraces and enlarges ethnic ministries:** highly effective / effective / needs improvement
- **7.9. Builds relationships in the pan-Methodist, ecumenical, and interreligious communities:** highly effective / effective / needs improvement

Proposed Evaluation Questions



Strengthens the Connection

- **8.1. Passionately supports connectional giving:** highly effective / effective / needs improvement
- **8.2. Proclaims the significance of covenant and connection:** highly effective / effective / needs improvement
- **8.3. Embodies and promotes the unity of the Church:** highly effective / effective / needs improvement
- **8.4. Balances superintending responsibilities within and beyond the episcopal area:** highly effective / effective / needs improvement

Completing the Performance Review =

Best Practices

1. Have a consistent system for all parties to complete the self-evaluations and evaluation forms.
2. All individuals should review each others forms prior to meeting.
3. Hold performance review meeting:
 - Let the Bishop speak first and give their input.
 - Respond with your own input.
 - Discuss areas where you disagree.
 - Avoid terms like “always”, “never”, etc.
 - Come to terms on actions, when possible.

Completing the Performance Review =

1 - 3 Rating Scale



01

Needs Improvement



02

Effective



03

Highly Effective

Rating Criteria

Needs Improvement



Fails to perform aspects of the goal or competency.



Performance levels are below expectations.



Requires consistent or close guidance in performing routine job duties.

Rating Criteria

Effective



Meets performance standards.



Competently performs all aspects of job functions and meets goals.



Capably adjusts to changing workplace needs and work requirements.

Rating Criteria

Highly Effective



The objectives were met in a way that exceeded the plan.



Continuously contributes to the organization's success by adding value.



Demonstrates a comprehensive understanding of work, proactively identifies needs and issues.

Completing the Performance Review =

Rating Perils

- **Halo/Horn Effect** – rate employees the same on every trait based on a previous experience.
- **Leniency** – avoids honest ratings to avoid conflict.
- **Recency** – narrow focus on recent events.

Completing the Performance Review =

Avoiding Other Rating Perils

- Make objective statements.
- Inadequate record keeping – lack of specific examples.
- Lack of establishing milestones for progress reviews.
- Legal impact of inflated performance ratings.
- Specific comments should avoid any connotations which are connected to: age, race, sex, religion, national origin, veteran, or a specific disability

Performance Management Meeting

Very Important!



**Nothing should be surprising
to the employee during the
performance review.**

Performance Management

Planning the Review

Advance planning – self appraisals should be completed prior to managerial review.

Plan for open dialogue – opportunity to review performance, consider lessons learned, progress for period, and establish goals and objectives for next period.

Lay out plan for performance discussions – collect and review notes, statistics, citations and performance-based examples.

Schedule sufficient time to focus on the review.

Performance Management

Planning the Review

Respect confidentiality of the review discussion when possible. If unlimited confidentiality cannot be promised, advise employee accordingly.

No cell phones, no emails, no text messaging, no electronic devices, no interruptions.

Job description/addendums should tie together with performance management.

Handle dissent professionally – disagreements should be noted as a matter of record.

Performance Management

Difficult Evaluations

- Describe unsatisfactory performance/behavior.
- Cite specific observed examples – past incidents or lack of meeting goals and impact on employee, team, customer, department, et al.
- Solicit constructive employee action plan to resolve or ameliorate the performance failures or behavioral issue.
- Review action plan and establish milestone date(s) to review progress.

Performance Management

¶ 412. Review and Evaluation of Bishops

Such processes shall include the participation of the conference or area committee on episcopacy. It shall be the duty of each jurisdiction's College of Bishops/central conference's College of Bishops, under the leadership of its president, to consult with and to cooperate with the committee in order to schedule and facilitate such reviews and evaluations as well as to address issues that may arise in the course of that work. Where there is the need for issues to be addressed, the jurisdictional or central conference committee on episcopacy shall ensure that all members of the respective college of bishops are informed that such work is recommended and receive quarterly reports from the college and/or individual bishop that the bishop is appropriately addressing the identified issue(s).



Thank you!



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