

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

September 2018

Dear Chalice Congregant,

We at Chalice are carrying out a comprehensive evaluation of Reverend Sharon Wylie. This is done once every 3-5 years. The Board of Trustees appointed a Task Force to carry this out. The members are [three names].

This is an important effort, not only to ensure Rev. Sharon's work is being done effectively, but also to provide feedback to Rev. Sharon to help her self-development and improvement efforts.

You are one of about 20 congregants (representing the Board, the staff, Committee Chairs, key volunteer positions and different age groups) being asked to complete the Evaluation Form that is enclosed in this envelope. If you agree to do this, please plan to write specific comments when possible in addition to marking the ratings.

Your completed Evaluation Form will only be read by the members of the Chalice Ministerial Evaluation Task Force. These Members will compile the results of the ratings and summarize the comments in an Evaluation Report. Specific comments may be included if they can be de-identified. Only the Evaluation Report will be shared with Reverend Sharon and the Chalice Board.

Please return the completed Evaluation Form by October 5. If you choose not to participate, just toss out the Form and email [names and emails of ETF members].

Thanks so much!

Sincerely,

Chalice Ministerial 2018 Evaluation Task Force Members

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

Introduction:

This document is the Evaluation Form to be used by evaluators to rate and comment on the performance of Reverend Sharon Wylie. We have chosen to have a “hard copy” of the form be completed rather than an electronic version in order to help ensure confidentiality. Please keep your completed Form confidential as you would for any employee evaluation.

Instructions:

There are 8 Categories (A – H) of ministerial responsibility to be evaluated. Within the Categories there are specific Tasks to be rated.

The definitions for the different competency ratings for the Tasks are:

Basic Competence – Performance expected of a recent seminary graduate

Approaching Proficiency – Performance that is more highly developed

Proficient – Performance that is expected of an effective minister

Expert/Exceptional – Performance demonstrates exemplary Ministry; the Minister may be considered a role model to other Ministers

Not Observed – The task is outside the purview of the evaluator; it was not directly observed by the evaluator

It is also important to describe in the Comment section details or examples that help explain your ratings. This will make your feedback more useful to the Task Force. It will also increase the ability of Rev. Sharon Wylie to use the information for her future professional development and Goals setting.

When completed, please return the Form in the enclosed envelope to:
[ETF member name and address]

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

Form:

A. Counseling & Pastoral Care

1. Makes herself available and provides warmth & empathy

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

2. Provides pastoral care at home or at the hospital at times of crisis

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

3. Encourages the congregation to be a caring community and develops appropriate support systems for congregants to help other congregants

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

4. Works in a confidential manner

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

5. Sets healthy boundaries for herself

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

Comments:

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

B. Practical Arts

1. Manages and supports professional staff in chief of staff role
(Consider: Communication of expectations and defines roles, delegation of tasks, provision of recognition and professional development opportunities, addressing performance concerns)

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

2. Manages relationships with and supports congregation leaders and volunteers
(Consider: Collaboration with governing board, provision of leadership and support to committees, helping to identify gaps in governance)

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

3. Provides oversight of the Coordinating Team
(Consider: Understanding the congregation's budget process and financial position, support of lay leaders to develop and articulate budget needs, contribution to a culture of stewardship and generosity)

| | | | | |
|-------|-------------|------------|---------|--------------|
| Basic | Approaching | Proficient | Expert/ | Not Observed |
|-------|-------------|------------|---------|--------------|

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

| | | | | |
|------------|-------------|-------|-------------|-------|
| Competence | Proficiency | | Exceptional | |
| _____ | _____ | _____ | _____ | _____ |

4. Demonstrates effective leadership and management skills
(Consider: Leadership and management skills for areas such as conflict management, change management, time management and project management, prioritization of work, demonstration of awareness of and compliance with relevant laws and regulations)

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

5. Makes use of social media and diverse technologies to enhance communication, outreach, and education efforts.

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

Comments:

C. Organizational Ministry

1. Encourages membership growth

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

2. Integrates new members

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

3. Creates a welcoming environment

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

4. Encourages a sense of community

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

5. Promotes a variety of programs consistent with the Mission

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

6. Pastors to all age groups

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

7. Nurtures lay leadership

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

8. Presents herself "professionally"

| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
|---------------------|----------------------------|------------|------------------------|--------------|
| _____ | _____ | _____ | _____ | _____ |

9. Develops personal goals and measures outcomes

| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
|---------------------|----------------------------|------------|------------------------|--------------|
| _____ | _____ | _____ | _____ | _____ |

Comments:

D. Personal and Professional Growth

1. Performs well under stress

| Basic | Approaching | Proficient | Expert/ | Not Observed |
|-------|-------------|------------|---------|--------------|
| _____ | _____ | _____ | _____ | _____ |

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

| | | | | |
|------------|-------------|-------|-------------|-------|
| Competence | Proficiency | | Exceptional | |
| _____ | _____ | _____ | _____ | _____ |

2. Is receptive to criticism and feedback

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

3. Gives constructive criticism and feedback

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

4. Conveys energy and enthusiasm

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

5. Gives and receives praise well

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

6. Acts with sense of humor

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

7. Manages interpersonal conflict

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

8. Balances work and personal/family life

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

9. Engages in a rewarding spiritual practice

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

10. Participates in professional continuing education

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

Comments:

E. Champions Liberal Religious Education

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

1. Oversees and supports congregation's religious education program for children, youth, and adults

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

2. Develops adult religious education opportunities

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

3. Articulates knowledge about UU resources and curriculum and about liberal religious education approach and philosophy

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

4. Encourages intergenerational activities and interactions

| | | | | |
|------------------|-------------------------|------------|--------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

Comments:

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

F. Worship

1. Leads the worship experience

(Consider: Creation of an aesthetically pleasing worship space, organization of effective worship flow/organization, collaboration on worship elements, e.g., with musicians, provision of a variety of experiences through worship, development of lay worship associates through effective recruitment, training, and empowerment, staying in tune with the worship needs of the congregation and determining those needs are being met)

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

2. Provides sermons, homilies and reflections

(Consider: inclusion of inspiring and interesting content in sermons, homilies and reflections, competent delivery through effective body movement, facial expression and voice, production of emotionally fulfilling, spiritually nurturing and intellectually stimulating impact)

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

Comments:

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

G. Denominational Activities

1. Stays involved in UU denominational and District events, UU Ministers Association Chapter meetings and interfaith activities

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

2. Encourages congregational involvement at district and continental levels

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

3. Informs congregation of UUA denominational concerns and issues

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

4. Strengthens UU identification among congregants

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

5. Updates the congregation following General Assembly each year

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

6. Fosters interest and involvement in Unitarian Universalist Service Committee

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

Comments:

H. Prophetic Outreach

1. Witnesses and advocates for community/social justice issues

| | | | | |
|---------------------|----------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

**Chalice Unitarian Universalist Congregation
Escondido, CA
Ministerial Evaluation Form**

2. Encourages congregational involvement in community/social justice issues including those specifically related to anti-racism, anti-oppression and homelessness

| | | | | |
|------------------|-------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

3. Builds the “Beloved Community”
(Consider: Promotion of dialogue among people with differences, encouragement of collaboration with people of other faiths, grounds social justice work in Unitarian Universalist values)

| | | | | |
|------------------|-------------------------|------------|------------------------|--------------|
| Basic Competence | Approaching Proficiency | Proficient | Expert/ Exceptional | Not Observed |
| _____ | _____ | _____ | _____ | _____ |

Comments:
