

An Effective Clergy and Staff Review Process

Clergy and staff evaluations are best accomplished as part of a regular process that ties in with a mutual ministry review by the church. Otherwise, objective, reliable and accountable performance evaluations become impossible. People will disagree about the measurement standards and tend to evaluate based on personalities, ad hoc standards, etc.

Ideally, a church will initiate a clergy and staff review process to meet four important objectives: (a) being clear about where the church is going and who is responsible for each activity, (b) having clear standards for accountability in mutual ministry going forward, (c) developing a strong leadership model for the church as it grows, and (d) setting compensation at a fair level (based on a comparison to other similarly sized churches).

An effective performance evaluation plan and process needs to complete the following individual planning steps:

1. *Understand community goals.* The church has a unique way of looking at performance reviews because we focus on the body of Christ and each person's unique contribution to it. The real evaluative question is whether each person is performing his or her particular function in the body? The first step in individual planning is the communication of the community goals that provides the context for each individual's plan. A Mutual Ministry Review may provide a clear foundation for looking forward to and agreeing what the church and each person plan to do. Once goals are communicated, it is up to each individual to be aware of these goals and priorities and the role he or she is expected to play in achieving the goals at all levels.

2. *Agree on effective individual goals.* The effectiveness of individual goals depends to a great degree on whether they meet the following four characteristics:

- Results-oriented (describing a result or outcome one intends to achieve): "Does the goal statement express a concrete outcome?"
- Measurable (objectively in quantity or quality to make it easier to gauge the progress made towards attaining the goal): "How will we know that the individual has achieved the goal?"
- Aligned (clearly reflecting the goals set out in the community plans): "Will achieving this goal contribute to a higher-level plan?"
- Stretch (presenting a meaningful challenge yields greater satisfaction and results): "Does this goal present a meaningful challenge?"

3. *Develop detailed action plans.* Even well-defined goals are not enough. For each goal, it is important to set out a detailed action plan that describes how the individual will go about achieving the goal. The action plan needs specific action steps that list the actions to be undertaken to achieve the goal. When outlining the action plan, ask "What steps does the individual need to take throughout the period to meet the goal?"

4. *Set timelines.* Specify the target date by which each action step needs to be completed in order for the individual to achieve his or her goals. This can either be a specific date, month, or quarter. In some cases it will be an ongoing activity. When setting a timeline, ask "When must the individual complete this step to achieve the goal by the end of the period?"

5. *Evaluate skills development.* Consider goals and priorities, individual competencies, career aspirations and the level of performance it will take to achieve them, and opportunities that will be available during the upcoming year for learning and performance growth.

6. *Identify help needed.* Identify the help needed to complete each action step. When identifying support/resources, ask "What resources and/or support does this individual need to assist in completing this step?" Some examples might include coaching, training or opportunity to work on a specific project.

The objective of this performance planning and review process is to help each staff member along a well-marked pathway to becoming even more appreciated, valuable, productive and unique. Ideally, goals will be included in a written covenant that can be used in a growing relationship with a regular, ongoing, and truly helpful evaluation and support process.

Because of the nature of performance planning and reviews, this process is usually completed by a team of no more than five people who are very involved in the life of the parish and responsible for working with the clergy or staff. The leaders responsible for planning and evaluating performance and compensation may become a ministry team to review performance on a quarterly basis and compensation on an annual basis, and make recommendations to the larger board. They need to stand by their recommendations and not seek survey-type input (especially from uninvolved or disgruntled people), and support the clergy or staff member in his or her growth.