PERSONNEL EVALUATION

1. <u>Introduction and Instructions</u>

Contents

This document consists of six parts:

Evaluation Objectives

This evaluation process cannot replace regular communication between the principal/supervisor and deputy/staff. Personal encouragement, regular staff meetings, prayer and mutual sharing of concerns are important to ongoing harmonious ministry. See the Personnel Report Form for a tool for regular staff meetings.

The purpose of evaluation is to enhance effectiveness in ministry and to identify strengths and weaknesses in job performance with a view to commending achievement and correcting difficulties. Specific recommendations for the improvement of skills and performance of the Reviewee will be part of the evaluation. Evaluation also premised that the greatest resource is the "human resource" and this resource needs to be treated with due care and thought. Personnel Evaluation really is an exercise in "People Making."

The Performance Evaluation Form is intended to facilitate the evaluation process and to stimulate good communication between the person under review and the principals who are responsible for supervision and review.

This process will help to determine if a revision of job description is necessary. It will aid the Supervisor in making suggestions to the persons under review in any matters deemed appropriate or necessary as it relates to their ministry. It will enable those with supervisory and/or evaluation duties to complete an annual evaluation and make whatever reports are necessary.. Items listed in Part 3, *'Evaluation of Skills and Abilities Measured Against the Job Description'*, are to help the Reviewer and Reviewee determine those factors that influenced the Reviewee's Results (Part 2) positively or negatively during the review period.

This process should also be helpful in setting of yearly goals and objectives. It should be on the whole affirming to the person under review.

Process

The Reviewer will normally be the immediate supervisor of the Reviewee. The Senior Pastor shall be the Reviewer for the Associate and other staff under his supervision. For the Senior Pastor's, it is often the Head Elder or Deacon or Board Chair who acts as the Reviewer. Because there is often some lack of confidence or experience on the part of the volunteer leaders in a local church, there can be value in selecting a small group of 2 or 3 to undertake the review. It is also a useful thing to have the District Superintendent to assist or to suggest an experienced assessor to assist as the leaders develop their own skill.

Completion of the Performance Evaluation (Parts 2 and 3) independently by the Reviewer and the Reviewee prior to the evaluation discussion should provide a basis for meaningful discussion. Only the Reviewer's final copy will be considered the official record of the Evaluation for Parts 2 to 4. Only those comments in Parts 5 and 6 that are recorded prior to the signatures of both the pertinent parties are part of the official record. Both parties shall receive an original copy of the official Evaluation (that is, each page shall be initialed and every signature shall be made in duplicate in the presence of the other party.)

When Evaluating the Senior Pastor

1. Pertaining to Part 2: The Senior Pastor would prepare the specific areas of accountability including projects, goals and assignments and submit them to the chairman of the Elders (or Deacons or Board) for discussion. The Head Elder (etc.) may choose to present or discuss the projects, goals and assignments to the Elders (etc), although the evaluation would not normally be discussed.

2. Pertaining to Part 2: They would meet with the Senior Pastor and the Head Deacon to review and discuss these stated goals.

3. Pertaining to Part 2: Specific projects, etc. undertaken during the course of the year would be noted and dated and incorporated into the evaluation. Any periodic project and ministry reports given during the course of the year would also help in the annual review.

When Evaluating the Associate Pastor

1. Pertaining to Part 2: The specific areas of accountability including projects, goals and assignments would be agreed upon by the Associate Pastor and the Senior Pastor.

2. Pertaining to Part 2: Reports of specific projects, etc. undertaken during the course of the year would be noted and incorporated into the evaluation.

Note on the use of Section 3: There is some observable redundancy in the arrangement. This is inevitable, because all the areas while distinguishable nevertheless overlap and interrelate. The importance is to evaluate with the major heading in mind: Task Management, Communication, Interpersonal Skills. There is a minor entry called communication under Task Management is there as it relates to task management, while the major section called Communication "unpacks" this category and deals with it more broadly. Task Management also has line items that deal with interpersonal relationships and communication. The "redundancy" is intended to provide a different cross section along a different axis.

NOTE: PLEASE USE BLACK OR RED INK FOR PHOTOCOPYING PURPOSES. THANK YOU.

Notes for Section 2:

Identify the five or six key areas of responsibility. If there are more than this many main areas of accountability there are probably too many.
Remember that you are "ball parking" and that the numeric value is not a precise measurement. When evaluating relative importance there are two factors, one is the amount of time given to that area of responsibility and second is the softer but no less "perceived importance."

2. **Evaluation of Results Measured Against Goals**

Name of Reviewee	Name of Reviewer
Position	Review Period: From To

	A	B	C	D	E	F	G	H	I
Outstanding									
Commendable									
Competent									
Provisional									
Unsatisfactory									
Rating number		100	80	60	40	20	Factor x ……	Result =	See below for factor and calculation information
Principal Goals & Projects Ongoing Duties & Accountabilities									Evidence/Comments/Results
Overall Performance (Sum H/Sum G)								=	

Factor: Very High Importance = 4; High Importance = 3; Moderate Importance = 2; Low Importance = 1

For each of the accountabilities, place the number in the box which best indicates the level of performance. Use the descriptions below as a guide. Write in the numeric value (100, 80, etc.) that corresponds to the category. Then in the Factor column the relative importance of this duty. For very high importance, use a factor of 4; for high importance, use a factor of 3; for moderate importance, use a factor of 2, and for a low importance, use a factor of 1. Multiply the rating by the factor for the result. To arrive at overall performance, take the sum of the Result column and divide it by the sum of Factor column listed. The number will yield a number close to one of the five categories.

Outstanding 100	Commendable 80	Competent 60	Provisional 40	Unsatisfactory 20
This category is for performance that is clearly and visibly superior in achievement and dedication.	This category is for performance that continuously exceeds the stated requirements and whose efforts, while not quite so visible, consistently advance ministry goals and objectives.	This category is for performance that consistently fulfills the stated requirements with high quality and productive performance.	This category is for performance by seasoned personnel whose work is adequate but also indicates a need for improvement before advancement. It also includes good progress toward competency in a new duty.	This category is for performance less than the stated requirements. This may indicate progress to the provisional level in a new duty.

Reviewee's Initials: *Date:*   *Reviewer's Initials:*   *Date:*

3. Evaluation of Skills and Abilities Measured Against the Job Description

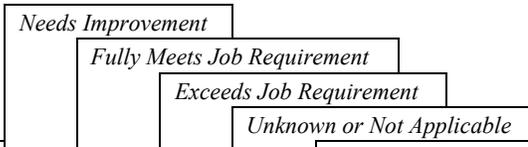| Factor	Needs Improvement -	Fully Meets Job Requirement =	Exceeds Job Requirement +	Unknown or Not Applicable U or NA	Evidence/Comments
TASK MANAGEMENT					
Project Conceptualization • Originates new/improved ideas, methods, etc. • Awareness/understanding of organizational structure • Able to conceptualize steps in process					
Project Planning and Organizing • Setting realistic goals/objectives • Clearly outline and details steps in process • Develop practical work plans • Implements and advances a project efficiently					
Supervision • Supervises, supports and motivates others well • Instructions are clear and well ordered • Anticipates and takes appropriate action • Monitors results to see that planned things happen					
Decisiveness • Takes prompt & proper action within authorized scope • Makes effective decisions / shows good judgment					
Communication • Timely, clear, effective					
Initiative/Energy • Extends personal resources / builds on strengths / works on deficiencies / shows dedication • Continues self-development • Applies planning skills effectively • Requires little supervision					
Problem Solving • Shows ability capacity to analyze and solve problems • Performing under pressure					
Completion • Tasks are completed promptly • Tasks are completed with attention to details					
Evaluation • Understands importance of evaluation/debriefing staff • Able to undertake formal evaluation with appropriate reports					
Reporting • Submits reports on time • Clear, concise and readable					

3. Evaluation of Skills and Abilities Measured Against the Job Description *(continued)*

Factor	*Needs Improvement* -	*Fully Meets Job Requirement* =	*Exceeds Job Requirement* +	*Unknown or Not Applicable* U or NA	Evidence/Comments
Accountability • Submits reports properly completed • Responds to supervisory direction by clear and prompt corrective action • Keeps supervisor and office properly informed of whereabouts • Keeps adequate and orderly records					
Time Management • Makes best use of time/priorities • Meets deadlines • Keeps agreed upon office hours • Begins day on time • Keeps appointments and commitments • Prompt and faithful attendance at meetings • Devotes sufficient time to ministry (base line 50 hrs.)					
Resources • Exercises economy in use of available resources and finances • Able to formulate and keep to a budget					

COMMUNICATION

Factor	-	=	+	U or NA	Evidence/Comments
Informal Conversation • Sensitive and friendly • Clear and appropriate					
"Listening" • To non-verbal signals • To others with accuracy, empathy and attention					
Public Speaking • Good expression / presentation • Clear, logical and orderly • Clarity of delivery / voice • Content (meaningful, relevant, appropriate)					
Telephone • Good and pleasant telephone manner					
Writing • Clear, orderly and effective writing					

INTERPERSONAL

Factor	-	=	+	U or NA	Evidence/Comments
General – includes skills as a pastoral visitor • Confidences kept/discreet • Wins trust and confidence • Friendly and kind • Open and appropriately demonstrative • Reasonable and forthright					

3. Evaluation of Skills and Abilities Measured Against the Job Description *(continued)*

Factor	Needs Improvement	Fully Meets Job Requirement	Exceeds Job Requirement	Unknown or Not Applicable	Evidence/Comments
	-	**=**	**+**	**U or NA**	
General – as Leader					
• Willing to direct and be responsible for the performance of others					
• Lays out path for others to follow					
• Open and appropriate sharing of information					
• Assertive and decisive: knows when and how to exercise authority					
• Encouraging and supportive					
• Influences / motivates others favourably					
• Recruits effectively					
• Develops, trains and advances others					
• Delegates appropriately					
• Achieves results					
• Effective conflict management / looks for solutions / reconciliation					
• Nips problems in bud / willing to confront					
• Listens to concerns with openness / able to hand criticism/suggestions					
General – as Ministry Team Member (committees, boards and other collegial relations)					
• Adapts to required changes in work environment					
• Understand and fulfills role					
• Open and appropriate sharing of information					
• Participates well and appropriate in committee work					
General – as Staff Member/Deputy (relation to supervisor)					
• Responds well to direction by prompt and appropriate action					
• Easy to supervise: makes timely and suitable reports					
• Consults sufficiently					
• Apt use of authority / independence within scope					
•Loyal and supportive					
• Understands and fulfills role					

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Reviewee's Initials: *Date:*   *Reviewer's Initials:*   *Date:*

4. **Summary and Development Review**

Name of Reviewee: _____   Date of Review: _____

1. Describe the reviewee's strengths.

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2. Describe the reviewee's areas of needed improvement.

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3. What <u>specific</u> in-service training and/ or general training and development are being or will be taken to help the reviewee develop in the ministry assignment or to help improve overall performance and to reach goals and objectives?

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4. Note improvements and progress since last review.

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Reviewee's Initials: *Date:*   *Reviewer's Initials:*   *Date:*

5. Reviewer/Reviewee Appraisal Summary

Name of Reviewee: _____   Date of Review: _____

Reviewee's Comments on Outcomes of Performance Discussion	Reviewer's Comments on Outcomes of Performance Discussion

Signature of Reviewee: _____   Date: _____

Signature of Reviewer: _____   Date: _____

Information contained in this appraisal document is confidential. The employee is entitled to a copy and a copy will be kept on file confidentially in the Church Office.

Reviewee's Initials: *Date:*   *Reviewer's Initials:*   *Date:*