
ANNUAL PERFORMANCE EVALUATION PROCEDURE Handbook

I. TCPC ANNUAL PERFORMANCE EVALUATION PROCESS GUIDELINES

- 1.1 In July, ask each staff member to submit to the Personnel Ministry Team the names of 4 Church members who they feel have worked most closely with them this past program year. This list of 4 names can also include a minimum of one other staff member, excluding the Head of Staff. The Head of Staff will always be an evaluator of his/her staff. The names are to be submitted to the Personnel Ministry Team prior to the end of July. The Personnel Ministry Team will choose 3 people from this list for staff other than the Head of Staff. All four people will be evaluators of the Head of Staff.
- 1.2 The Personnel Ministry Team, upon receiving these names, will select 3 additional names from a list they compile of current, highly involved Church members, who are in a position to have worked directly with the staff member. Each evaluation team shall consist of 7 members along with the Personnel Ministry Team Liaison.
- 1.3 The Personnel Ministry Team will assign a Ministry Team member to each staff member to act as liaison and facilitator of that staff member's evaluation. This person will not evaluate the staff member.
- 1.4 The Personnel Ministry Team will be responsible for distributing a cover letter and Staff Evaluation Form (see attached), plus a copy of the appropriate position description for each Staff member to the evaluation team. This should be done in early August.
- 1.5 The completed Evaluation Form should be returned to the Personnel Ministry Team representative who has been assigned to that Staff Member. This should be received by the end of August.
- 1.6 At the same time the evaluation teams are receiving their forms, each staff member will receive a copy of the Performance Review "Self Evaluation" form to complete and return to the Personnel Ministry Team by the end of August.
- 1.7 Each Personnel Ministry Team member who is a liaison/facilitator is responsible to follow up on obtaining the reviews in the required time frame.
- 1.8 After all the forms have been completed and returned, the forms will be summarized in correct format by the liaison/facilitator and distributed to the other Personnel Ministry Team members for review and discussion.
- 1.9 The Personnel Ministry Team Chairperson, the Ministry Team liaison/facilitator, the Senior Pastor, and the staff member will then meet as a group to review the results and discuss the specific feedback items. Copies of the Evaluation summary (but not the evaluations themselves) will be given to both the Head of Staff and the person being evaluated prior to this meeting. These meetings should be held in September. The Head of Staff is responsible to place a copy of the review in each staff member's personnel file.
- 1.10 Subsequent to the meetings with staff members, the Personnel Ministry Team will prepare an Executive Brief. The Personnel Chairperson will then meet, at a time designated, with the Board of Session to provide a summary review. To preserve confidentiality, the Performance Evaluation forms will not be distributed. Only the Executive Brief will be distributed. This would normally be done in October.

- 1.11 It is intended that the entire evaluation process and the feedback sessions be completed by the end of September with the Session being briefed on evaluation results in October.
- 1.12 Any salary review and recommendation will be part of a separate process and will be made after submission of the initial budget and by the end of December. At that time the merit portion of the evaluations may be used to assist in determining staff compensation.
- 1.13 A complete copy of the evaluation and results will be kept sequestered for a period of one year in the files of the Personnel Ministry Team. A completed review will consist of:
 - a. The questionnaire forms prepared by the Church members
 - b. The Self-Evaluation Questionnaire form prepared by the Staff member
 - c. The Evaluation Summation by Questionnaire
 - d. The Evaluation Summation by Job Description Category
 - e. The Changed or New Objective document
 - f. The completed evaluation scale
 - g. The Personnel Ministry Team Chairperson's Executive Brief
- 1.14 The Head of Staff will keep a copy of all the above items in the staff members personnel file except the original questionnaire form prepared by Church members and the Self-Evaluation Questionnaire.
- 1.15 The action of the Session shall be recorded in the minutes of the Personnel Ministry Team.
- 1.16 The Chair of Personnel Ministry Team shall notify the bookkeeper and staff of salary changes or staff and the appropriate date of implementation.

II. SAMPLE LETTER TO EVALUATORS (Use TCPC Letterhead Stationery)

{date}

Dear _____:

You have been selected as one of seven members of the Church and the Personnel Ministry Team to help with the Annual Evaluation of the Staff's job performance for this past Church program year. The Personnel Ministry Team requests your assistance by taking some concentrated time to complete this evaluation form for {name}_____. Also, please find enclosed a copy of her position description and a one-page summary on "Guidelines for Effective Performance Evaluation."

Each Staff person has selected three individuals with whom they have worked closely this year to complete the evaluation form. The Personnel Ministry Team has selected three additional people from the Congregation and the person's supervisor to also complete the form. A liaison person from Personnel (who does not evaluate the staff member) will compile the forms and prepare a summation that includes all responses. This summation will not reveal your identity to the staff member.

We ask that you please return the completed form by August _____. Return the form in a sealed envelope, with the name of the Personnel Ministry Team Liaison on the outside of the envelope. Place this in the Personnel Ministry Team mail slot in the mailroom.

Thank you very much for your assistance and cooperation. Your prompt attention is greatly appreciated. If you are unable to complete this form by _____, please let the undersigned know as soon as possible. If you have any questions, please feel free to call your liaison, _____.

Yours in Christ's Service,

_____, Secretary
Personnel Ministry Team

III. GUIDELINES FOR EVALUATORS TO ENSURE EFFECTIVE PERFORMANCE EVALUATION

The performance evaluations are designed to give specific feedback to staff. Evaluation decisions are made by comparison to the job description. People either exceed, equal, or fall short in the comparison. Performance evaluations should concentrate on results achieved. Identify trends and avoid using isolated instances for evaluation.

Results can be measured by: Quantity – how much was accomplished compared to expectations. What circumstances beyond the individuals control impacted the results; Quality – How good are the results compared to the quality expected; Cost – What costs were incurred to achieve results and how do they compare to budget; and Timeliness – Is work completed on time? If not, why not? Are delays due to items beyond the individual's control or due to poor planning and control?

Rate Objectively. Try to avoid rating a person good or bad in all areas based on experience or knowledge of only one dimension. Avoid the tendency to rate all persons as outstanding, or, rating all persons low and being overly demanding or critical. Try not to evaluate someone as average in all areas regardless of major performance differences.

Use the job description provided as a guide and use factual examples. The person should be measured in relation to the pre-existing requirements and objectives stated in their job description. Examples should be objective and specific rather than subjective and general. Use quantitative examples when possible. For example, state "attended 10 of 12 ministry team meetings" rather than "missed a few ministry team meetings".

If you think responsibilities/tasks needed to be added or deleted from the job description, make a separate note for the use of the Personnel Ministry Team. Do not rate someone on a task you "think" they should be performing if it is not in the job description. For example: "Music Director is not teaching enough Sunday School classes", would not be appropriate in that review. Instead suggest that teaching two classes a year should be added to that job.

Emphasize future development. A) Analyze performance and suggest appropriate strategies for strengthening areas in need of improvement. B) Plans offered should be goal-oriented and measurable. For example: "Hold 3 training retreats for Deacons". C) Suggest follow-up plans to ensure employee growth.

Emphasize the Positive. Positive reinforcement motivates. Positive plans and suggestions aid in developing full potential. For example: "Demonstrates support for and involvement in stewardship campaign by preaching 3 stewardship sermons." Or, "Can improve effectiveness in stewardship campaign by preaching 3 sermons."

Work Habits can be evaluated as a tool to determine the root causes of poor performance. This may include attendance, punctuality, planning, organization, administration, technical, professional and interpersonal skills.

*****References: Effective Phrases for Performance Appraisals, James E. Neal Jr. 658.3125N; Stepping Up to Supervisor, Marion E. Haynes, 658.302H; Personal Styles & Effective Performance, David W. Merrill & Roger H. Reid, Chilton Book Co.

IV. TPCP STAFF PERFORMANCE EVALUATION REVIEW (for Evaluators)

{date}

Staff Member: _____

Position: _____

1. Describe your specific working relationship with the above staff person this past program year. What has been the nature of this relationship? How has this been a positive experience (cite any specific examples). Do you have any suggestions for improvement or development?

2. Please indicate the specific area(s) where performance for the program year has been especially effective. What are the highlights and include examples to support your comments.

3. Identify this staff member's overall strengths and cite specific examples of how these have been demonstrated.

4. Please indicate the specific area(s) where performance for the year has not met your expectations. Identify areas for improvement and cite specific examples to support your comments.

5. Please indicate a maximum of three specific areas where major efforts or areas of emphasis should be focused during the coming program year.

6. Do you have any other constructive comments, suggestions or observations (concerning Worship, Sermons, Pastoral Care, Christian Education, Church Administration, etc.)?

Signed: _____ Date: _____

V. SAMPLE LETTER TO STAFF (Use TCPC Letterhead Stationery or email)

{date}

To: YYYYY, Head of Staff
XXXX, Associate Pastor
HHHH, Music Minister
OOOO, Christian Educator
PPPPP, Custodian
UUUU, Administrative Assistant
QQQQ, Director, Promises Preschool

From: RRRR, Chairperson, Personnel Ministry Team

Subject: Annual Review Process

Enclosed are a self-review form and a job description for your position. Please fill out the form and return it to the Personnel Ministry Team mailbox by _____. Your Ministry Team Liaison is _____. Please give attention to the section on goal setting, as it will help form a basis for your next evaluation. These goals should be specific and measurable as to effectiveness, tied to the Vision where possible, and present any proposed allocation of time/duties. If you have questions, please contact your liaison, _____. Thanks for your input.

Yours in Christ's Service,

_____, Secretary
Personnel Ministry Team

VI. TCPC STAFF PERFORMANCE EVALUATION REVIEW (for Staff)

{date}

Staff: _____ Position: _____

1. The following items are aspects of my position that challenge and excite me the most:

2. The parts or aspects of my position that I like the least or that are difficult to do are:

3. The major strengths and talents that I believe I bring to this position are as follows:

4. Please identify those areas where you feel you need the most improvement and what specific steps do you feel you need to do in order to bring about any change?

5. Identify the specific major objectives, including measurable results, you have achieved this program year relative to last year's goals and objectives. Please list accomplishments:

6. Describe three changed or new objectives for the new program year and identify specific results you expect to accomplish:

7. What resources or assistance do you feel you need in order to be more productive and effective in your position?

Signed: _____ Date: _____

VII. STAFF EVALUATION SCALE

Job performance evaluation for the Professional Staff of Three Chopt Presbyterian Church is the responsibility of the Personnel Ministry Team and the Senior Pastor/Head of Staff. The Personnel Ministry Team will use the following ten-point scale to rate performance for merit-based raises:

9-10 Excellent - an individual whose performance greatly exceeds the expectations of Personnel Ministry Team, Staff and Church members who are asked for input to the evaluation process. This rating does not indicate that higher performance cannot be achieved.

7-8 Very Good - an individual whose performance is substantially above normal requirements as set forth in that person's job description. Some improvement is targeted in evaluations by the Personnel Ministry Team, Staff and /or Church members who are asked for input to the evaluation process.

5-6 Satisfactory - an individual whose performance meets normal expectations in all significant respects as defined in the job description. Improvement is desirable in some limited areas as noted by the Personnel Ministry Team, Staff, and Church members who are asked for input to the evaluation process.

3-4 Deficient - an individual whose performance does not meet the minimum expectations as defined in the job description in one or more significant respects, whose performance is considered less than adequate, and of whom significant improvement is expected in future evaluation periods.

0-2 Unsatisfactory - an individual who is deficient in one or more significant respects, whose performance is considered significantly less than adequate, and where significant improvement has not occurred in previously identified areas of deficiency since the last evaluation period. These ratings indicate the staff member is not meeting professional standards as stated in the job description.

Each individual staff evaluation must be tailored to the staff member's job description. Each job description will specify the major areas of responsibility particular to each staff member. Evaluations in each area will be weighted by the appropriate percentages of the staff member's time and /or priority to determine the overall evaluation. These guidelines are just that - guides to evaluation of staff members that cannot be rigidly applied to all situations. They must be interpreted in an appropriate manner to fit the circumstances of individual staff members.

This evaluation scale is to be used only by Personnel Ministry Team, and only after the subjective evaluation forms have been received from staff members and Church members who have been asked for input to the evaluation process. **This objective scale is intended to provide a means for allocating merit-based salary increases, and is not intended to replace the written form of input from appropriate parties within the Church which is important for professional development of staff members.**

VIII. SAMPLE STAFF EVALUATION SCALE SUMMATION

**SUMMARY OF REVIEWS
EVALUATION SCALE
HEAD OF STAFF**

	<u>Weight</u>	<u>Review</u>	<u>Score</u>
A. Worship Leadership	30%	Excellent	9 x 30% = 2.7
B. Pastoral Care Leadership	25%	Very Good	8 x 25% = 2.0
C. Administrative Leadership	20%	Satisfactory	5 x 20% = 1.0
D. Stewardship Leadership	10%	Satisfactory	6 x 10% = 0.6
E. Spiritual Growth Leadership	15%	Very Good	8 x 15% = 1.2

Total Ranking Overall = 7.5

Scale

- 9 - 10 Excellent
- 7 - 8 Very Good
- 5 - 6 Satisfactory
- 3 - 4 Deficient
- 0 - 2 Unsatisfactory

IX. Evaluation Summation Sample - Head of Staff - Aggregate of Questionnaire Responses

This is a sample summation that incorporates the major points of each evaluation. To compile this you aggregate all reviewers' responses to each question. This will allow you to better discuss the review with the staff person and also allow for easier analysis and transfer to the Job Description Category Summation.

Questions for reviewers with each reviewer's answers aggregated under appropriate question.

9.1 Describe your specific working relationship with the Head of Staff, the nature of the relationship, how this has been positive, and any suggestions for improvement.

Evaluator #1. My relationship is attending weekly services. Her preaching skills are clearly above average. I have had several surgeries. Pastor has been very supportive with many visits at home and at the hospital. She has very good pastoral care skills.

Evaluator #2. I have participated in the special Lenten class she taught and as a worshiper at Church. Both areas have been positive experiences. Her preaching skills are excellent. Her teaching skills are above average but I would like her to encourage more student participation in class discussions. Her Head of Staff skills are mostly above average, especially in planning and education resource.

Evaluator #3. She is the primary staff resource to the XYZ Ministry Team. Our new ministry team could have used more input into setting our goals and devising an agenda. She is moderately effective as Staff Resource to the ministry team. She is very effective in the area of pastoral skills and in implementing an inspirational Worship Service.

Evaluator #4. Served as Elder to her Moderator of the Session. I would like more structure to the meetings with timed agendas. She is average in this area

9.2 Please indicate the specific area(s) where performance for the program years has been especially effective. What are the highlights and include examples to support your comments.

Evaluator #1. There has been a pronounced improvement in sermon content and delivery. Sermons have been Biblically based and applicable for day to day living.

Evaluator #2. Liturgy, scripture selections, hymns, etc. are very effective and coordination with music ministry is very effective.

Evaluator #3. She is most effective in preaching. Increasing use of scriptural and historical strong points has strengthened the past year. She is following through with strategic planning and has developed ministry goals based on the vision statement.

Evaluator #4. I see growth in worship leadership.

9.3 Identify this staff member's overall strengths and cite specific examples of how these have been demonstrated.

Evaluator #1. There is creative worship with inclusive scripture and music. She works well with the Worship Ministry Team and Staff on planning the worship service.

Evaluator #2. She has improved delivery and content of her sermons. She has encouraged recruitment of newer members for the Session and Deacon Board instead of relying on older members for church leadership.

Evaluator #3. She has improved in her teaching; She has started some direct contact with the children, teaching through age appropriate sermons.

Evaluator #4. She has strong pastoral skills. I have accompanied her on home and hospital visits. Her manner is non-intrusive, familiar and comforting, and her prayers are uplifting and appreciated. She is a warm and approachable person.

9.4 Indicate the specific area(s) where performance for the year has not met your expectations. Identify areas for improvement and cite specific examples to support your comments.

Evaluator #1. My needs have been met.

Evaluator #2. Needs to provide personal training for the new Session members that is specifically oriented to our current goals.

Evaluator #3. Needs to help ministry team s define their needs and duties. A course might be helpful.

Evaluator #4. Needs to formalize the new member process from first visit to assimilation into the Church. People fall through the cracks. Perhaps form a new ministry team.

9.5 Please indicate a maximum of three specific areas where major efforts or emphasis should be focused during the program year 2001-2002.

Evaluator #1. Emphasize structure of ministry teams with continuity built in.

Evaluator #2. Update and enforce policy and procedure manuals to keep things from slipping through the cracks.

Evaluator #3. Put emphasis on attracting new members and put in a process to provide training and follow-up.

Evaluator #4. 6. She needs to put increased emphasis on stewardship.

9.6 Do you have other constructive comments, suggestions or observations?

Evaluator #1. No suggestions.

Evaluator #2. Her performance meets and exceeds my overall expectations.

Evaluator #3. In Worship Leadership she clearly exceeds expectations. In Stewardship Leadership she meets expectations. Administrative skills are average.

Evaluator #4. She should strengthen the annual report to more fully inform the congregation about the use of funds.

**X. Evaluation Summation Aggregation Sample – Head of Staff Evaluation
Summation of Reviews by Job Description Category**

Instructions: from the Evaluation Summation, list the responses applicable to each category. Make a determination about the level of performance these responses reflect. Further discussion by the Ministry Team can assist in difficult determinations.

A. Worship Leadership - Expected to take 30% of Pastor's time or about 12 hours a week.

- Her preaching skills are clearly above average.
- Her preaching skills are excellent.
- Implements an inspirational worship service.
- Pronounced improvement in sermon content and delivery.
- Liturgy, hymns, etc. are very effective, as is coordination with music ministry.
- Most effective in preaching. She has scriptural and historical strong points.
- I see growth in worship leadership.
- Creative and inclusive worship.
- Improved delivery and content of sermons.
- In worship leadership she clearly exceeds expectations.

Summary: Much growth in area of sermons and unified service. Considered Excellent in performance of this aspect of ministry.

B. Pastoral Care Leadership - Expected to take 25% of Pastor's time or about 10 hours a week.

- She has been very supportive, many visits, very good pastoral care skills.
- Very effective in area of pastoral skills.
- She has strong pastoral skills. She is warm and approachable.

Summary: Possesses strong skills in visitation. She is supportive in crisis situations. Overall rating is Very Good.

C. Administrative Leadership - Expected to take 20% of Pastor's time or about 8 hours a week.

- Her head of staff skills are mostly above average, especially in planning and education resource.
- Our ministry team could have used more input into goals and agendas. She is moderately effective as a staff resource.
- As Moderator of Session, I would like to see her bring more structure to the meetings. She is average in this area.
- She is following through with strategic planning and has developed ministry goals based on the vision statement.
- Works well with Worship Ministry Team and Staff on planning worship.

- Needs to help ministry teams define needs and duties.
- Needs to emphasize structure of ministry teams and continuity of leadership.
- Needs to update and enforce policy and procedure manuals.
- Administrative skills are average.

Summary: There are good comments about her work with the vision and planning. Comments indicate that more ministry team involvement is desirable. A rating of Satisfactory is appropriate.

D. Stewardship Leadership - Expected to take 10% of Pastor's time or about 4 hours a week.

- She has encouraged recruitment of newer members for Session and Deacon Boards.
- She needs to put increased emphasis on stewardship.
- In stewardship leadership she meets expectations.

Summary: A rating of Satisfactory is appropriate.

E. Spiritual Growth Leadership - Expected to take 15% of Pastor's time or about 6 hours a week.

- Her teaching skills are above average.
- She is following through with strategic planning and developed ministry goals based on the vision statement.
- She has improved in her teaching. Now has direct contact with the children teaching through age appropriate sermons.
- Needs to provide personal training for new Session members oriented to current goals.
- Needs to formalize new member process. People fall through the cracks.
- Put emphasis on attracting new members and provide training and follow up.

Summary: Her teaching skills have shown improvement in formal teaching areas. Several areas for enhanced adult teaching and training are mentioned. A rating of Very Good is appropriate.

XI. SAMPLE GOALS AND OBJECTIVES

This Sheet Should Be Prepared By The Facilitator After The Meeting With The Staff Member, Agreed Upon By Both Parties And Made A Part Of The Personnel File For Use In The Next Staff Evaluation

**HEAD OF STAFF CHANGED OR NEW
OBJECTIVES FOR COMING YEAR _____**

The following objectives are in addition to the usual and normal objectives as stated in the job description. These changed/new objectives are based on review results that include requests for more ministry team assistance and support; increased emphasis on stewardship, Session needs for improved process and a need for enhanced pastoral care activities.

1. Devise and implement a program for increased pastoral care by staff and Deacons based on the job description priorities. Include a paper trail and reports from staff and Deacons to Head of Staff. Include updates in Session reports.
2. Preach one Biblically based sermon series based on the global aspects of stewardship for today.
3. Take one course on working with ministry teams.
4. Set up regular conference times (every two months) with ministry team chairs outside of the meetings to give support and guidance. Keep comprehensive notes of meetings.
5. Restructure Session meetings and train members for a more focused approach.

This document will be a part of the evaluation results for the year _____ and will be considered in the evaluation for {name}_____. A copy is to be attached to the current review and placed in the Personnel files by the Head of Staff.