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EXAMPLE STAFF REVIEW AND DEVELOPMENT PROCESS

[INSERT CHURCH NAME HERE] Staff Review and Development Process

Introductory Note:

This Staff Review and Development Process is provided as an example for churches to adapt as relevant to their ministry team and leadership group/governance context. Explanatory notes are included at the beginning of each section to guide the development of a process for your church. Example text for that section is then provided.

This is the Staff Review and Development Process for [INSERT CHURCH NAME HERE]. It is to be used in conjunction with staff Position Descriptions and Staff Review Documentation.

Background and Purpose

Explanatory Notes (delete from final version):

Having an intentional staff review process ensures that staff and those who oversee them have a mechanism for planned and constructive reflection and feedback on performance to be given, and have the opportunity to set and review mutually agreed goals and objectives. This process also aims to ensure staff feel supported, are clear on their and the church's priorities for the coming season, and have the opportunity to grow and develop in their ministry role.

Churches and pastoral roles differ to businesses and organisations, and there might be some reluctance to formally review performance given pastoral roles are a calling. However, if done well, formal staff reviews provide clarity to staff, elders and the congregation, promote and enhance communication, and ultimately help move the church towards its vision. They also allow for early identification and resolution of any mismatch of expectations and priorities. Reviews are also an opportunity to celebrate and acknowledge what the Lord has done in the life of the church and the ministry of the pastoral team. This article from the US Presbyterian Church provides a useful reflection on this: https://byfaithonline.com/evaluating-the-pastor/.

This Review and Development Process requires that a current and agreed **Position Description** is in place for all staff. The outcomes of the Review and Development Process should be documented. Refer to the **Example Staff Review Documentation**.

The Staff Review and Development Process is made up of a review (how well a staff member has carried out their responsibilities) and development planning (mutually agreed goal setting and development objectives for the future).

This Staff Review and Development Process for [INSERT NAME HERE] Church of Christ outlines the approach that will be followed for conducting formal staff reviews. We believe that an intentional staff review process ensures that staff and those who oversee them have a mechanism for planned and constructive reflection and feedback on performance to be given, and have the opportunity to set and review mutually agreed goals and objectives. This process also aims to ensure staff feel supported, are clear on their and the church's priorities and have the opportunity to grow and develop in their role.

This process applies to all paid staff roles at [INSERT NAME HERE] Church of Christ.

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Who Will Conduct Staff Reviews

Explanatory Notes (delete from final version):

A review of the Ministry Team Leader (MTL)/Senior Pastor should be conducted by the elders/Board as this is the group they report to. It is recommended the review is conducted by 2 of the elders, one of whom would be the Chair. The review should represent the collective agreed feedback from the eldership as a group to the MTL, based on the position description and agreed development plan and goals. This ensures a clear and unified review of performance and agreement on future development and goals. 360 feedback should also be considered for the MLT/Senior Pastor. Contact churchsupport@cofcqld.com.au for advice.

Reviews of other church staff should be carried out by the staff member to whom they report. The MTL/Senior Pastor may request the assistance of one of the elders to conduct staff reviews, or this may be included in this process as standard practice.

Direct feedback should only be provided to staff by the person/group to whom they report. This means the Elders/Board should only provide feedback to other staff through, or in conjunction with, the MTL/Senior Pastor.

All paid staff at [INSERT NAME HERE] Church of Christ will have a review conducted by their direct supervisor at least once per year.

The MTL/Senior Pastor review will be conducted by the Chair of Elders and one other elder.

The MTL/Senior Pastor will conduct a review with all other staff, with an elder's representative also present at the review of other pastoral staff roles.

If the elders have specific feedback to provide to administrative or technical staff roles, this will be discussed with the MTL and they will incorporate this into those staff reviews.

Types of Review

Explanatory Notes (delete from final version):

An initial discussion/goal setting should occur within 6 months of the staff member commencing, but would not include a rating of overall performance. If the staff member has a probation period, it should occur after this has been passed. This initial discussion should focus on 1) an initial review of the position description responsibilities and how these will be worked towards in the first year (Part 2 of **Example Staff Review Documentation**) and 2) on specific goals and development for the period (Part 3 of **Example Staff Review Documentation**).

An annual staff review involves a comprehensive review of the staff member's achievements against position responsibilities. Specific achievements and challenges should be noted. A suggested overall performance rating scale for each position responsibility area is provided in the **Example Staff Review Documentation**; these being exceeding, meeting or not meeting expectations. Then development plans and goals should be set for the coming 12 months through a review of the key responsibilities in the Position Description. The overall position responsibilities and outcomes required are not likely to change significantly, however the emphasis on different areas may change, growth needs may be identified and new opportunities may arise. This should be mutually agreed and documented.

It is optional, but good practice, to schedule an interim review (e.g. 6 months after an annual review). This provides opportunities to review if development plans and goals are

on track, and to discuss achievements and challenges experienced in fulfilling position responsibilities. Adjustments can be made and documented at this review where necessary.

Ongoing constructive feedback on a staff member's fulfilment of their position responsibilities should also be given informally, but only by the person/group the staff member reports to.

Should significant performance or other disciplinary issues arise these would be addressed outside of the regular review framework.

[INSERT NAME HERE] Church of Christ conducts the following reviews with staff:

Initial discussion/goal setting: within 6 months of the staff member commencing and after probation is passed (if relevant). This review will focus on 1) an initial review of the position description responsibilities and how these will be worked towards in the first year, and 2) on specific goals and development for the period.

Interim review: This will apply to pastoral roles (not administrative or technical roles). An interim review will be scheduled 6 months after an annual review for all pastoral staff positions. This review will focus on 1) reviewing if development plans and goals are on track, and 2) to discuss achievements and challenges experienced in fulfilling position responsibilities. Adjustments will be made and documented at this review where necessary.

Annual staff review: This will be conducted annually, usually in [INSERT MONTH]. This review involves 1) a comprehensive review and overall performance rating of the staff member's achievements against position responsibilities and, 2) setting mutually agreed development plans and goals for the coming 12 months.

All discussions will be guided by the role responsibilities in the position description.

Review Process Flowchart

Explanatory notes (delete from final version):

The process allows both the staff member and person/group they report to reflect and prepare for the review prior to meeting to discuss. The process also ensures that adequate attention is given to looking forward and setting goals and development plans, and that documentation occurs.

In relation to staff goals and development, it should be noted that there are many different methods that can facilitate staff development and/or performance improvement. Training or study can be an effective strategy when training or knowledge is correctly identified as a need. However, there are also a number of non-training/study solutions that may meet staff needs (for example, undertake a new project, read publications or professional journals and join a network or retreat group).

Staff reviews will be conducted in 4 stages. Details are provided following the flowchart.

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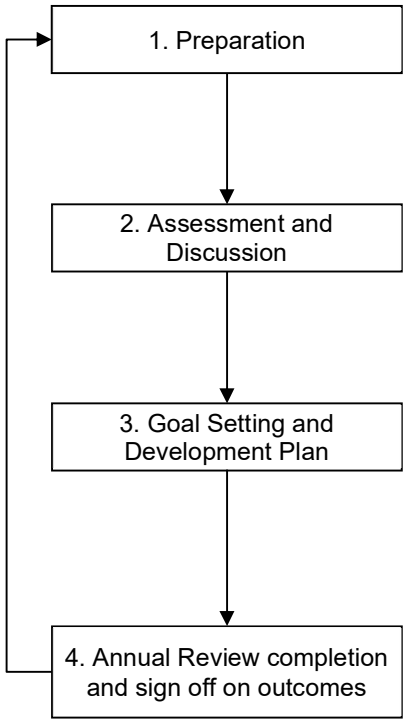

1. Preparation

A time for the review will be set and adequate preparation time allowed for all involved. Both the staff member and reviewer/s will prepare for the review by reviewing last year's goals and development plans, and the position responsibilities. Both should make note of achievements and challenges. If using the **Example Staff Review Documentation**, preparation focuses on Parts 1 and 2.

2. Assessment and Discussion

During the discussion, the staff member and reviewer/s will make a mutually agreed assessment of the staff member's current performance against the responsibilities in the position description. This will include celebrating achievements and noting where things additional to the role have been taken on. The discussion should also make note of reasons why some aspects of the position responsibilities may not have been achieved. This may have included an agreed change in priorities, a lack of resources, or overall workload challenges. Ongoing communication throughout the year should mean these things do not come as a surprise during the formal review.

Potential areas for development and/or improvement will also be discussed. This will focus on the skills and knowledge the staff member requires to effectively carry out the duties in their current position. Opportunity should also be given to discuss any aspirations in relation to current or future roles and any areas in which the staff member needs to continue to develop to gain the skills and experience to move towards these.

If using the **Example Staff Review Documentation**, this focuses on Part 2.

3. Goal Setting and Development Plan

Based on the discussion in Stage 2, the staff member and reviewer/s will mutually agree on goals and development plans as outlined in Part 3 of the **Example Staff Review Documentation**.

This will include working through the key responsibilities in the Position Description and highlighting any specific areas / objectives that are to be focussed on during the next review period. The overall position responsibilities and outcomes required are not likely to change significantly, however the emphasis on different areas may change, growth needs may be identified and new opportunities may arise.

The staff member and reviewer/s should also agree and document how each goal and development objective will be achieved and a timeframe for when each goal is to be achieved by.

4. Review Completion and Sign Off

Following the completion of Stages 2 and 3, the staff member and reviewer will complete the overall summary comments and sign off the review. An agreed timeframe for the next review (interim or annual) will also be nominated.

A copy of the review will be kept securely and a broad summary will be provided confidentially by the reviewer/s to the next elders/key governance group meeting.