

Church Staff Evaluations



TABLE OF CONTENTS	PAGE
Leader's Guide	2
Preliminary Steps for Church Staff Evaluations	3-4
Staff Evaluation Forms	
Ministry Review of Objectives and Goals	5-6
Performance Appraisal for Pastoral Staff.....	7-10
Performance Appraisal for Musicians	11-15
Performance Appraisal for Administrative Staff	16-17
 Supervisor Forms	
Pastoral Performance Evaluation	18
Musician Performance Evaluation	19-20
Administrative Staff Performance Evaluation.....	21-24
 Additional Resources	25





Leader's Guide

How to use "Church Staff Evaluations" by BUILDING CHURCH LEADERS

Welcome to BUILDING CHURCH LEADERS: your complete guide to leadership training. You've purchased an innovative resource that will help you assemble a church staff evaluation. Selected by the editors of Leadership Resources at Christianity Today International, these are the best components of numerous evaluations, which come from a variety of churches and denominations.

We have assembled eight forms that you can use to evaluate your church staff. You may use any form as it appears in this training packet, or you may customize them for your particular use.

The forms range from helping a staff member establish and review his or her goals and objectives to reviewing specific roles such as musicians and administrative staff. The "Staff Performance Evaluation" looks at job efficiency and will help a supervisor to evaluate almost any kind of staff position.

We hope these forms will assist your church in making staff evaluations a smooth and helpful process.

Need more material, or something on a specific topic? See our website at www.BuildingChurchLeaders.com.

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PRINTING NOTE: To print out the forms you would like to use, put your cursor on the page to print and notice the section number located on the left side of the status bar at the bottom of the page.



Click "File" + "Print," select "Pages," and type "s" and the section number in the corresponding box. For example, if you would like to print the third form, "Performance Appraisal for Musicians," type "s6."

* We've worked hard to make sure this information is accurate and legally sound. However, we remind you that this is not a substitute for legal counsel. If your church has a legal question, be sure to talk with an attorney.



Preliminary Steps for Church Staff Evaluations

Help your staff make the grade.

by Stephen Dees

Many employers, especially churches, consider the topic of staff evaluation a nuisance. Comments often include: "We don't have time to worry with evaluating our staff," or "Staff evaluation is a waste of time," or "Our staff do a great job so we don't need to evaluate them."

Staff evaluation doesn't have to be a nuisance. It can be a necessary tool that assists churches in critical areas of personnel management. Churches that have a good staff evaluation program in place often see the morale and work ethic of their employees improve dramatically.

Communicate Effectively

Here's a typical church office scenario: It's 8:00 on a weekday morning. The phones are ringing faster than they can be answered. Church members Maybel Johnson and Francis Smith have just arrived at the office and are asking to see the minister of music. The senior pastor walks through the church office and praises the receptionist for an excellent job on typing his sermon outline for the previous Sunday's service. Sounds like a normal workday, right? But the problem is, the receptionist was so busy trying to answer the phones and point Maybel and Francis in the right direction that she thought the pastor was criticizing her typing of the sermon notes. Maybel and Francis, on the other hand, felt offended because the pastor didn't say anything to them.

Cases of communication failure similar to the above scenario happen every day in churches across America and underscore the need for a formal staff evaluation system.

It's no secret that communication is a two-way process. It requires the attention of both parties involved. Communicating approval or disapproval of an employee's performance requires a distraction-free setting. Both the employer and the employee involved must be tuned in to what the other is saying.

Clarify Job Descriptions

The first step in creating an evaluation instrument is determining what role each position plays. This is most often called a job description. To be effective, staff evaluation instruments must be directly linked to each employee's job description. After all, it isn't fair to evaluate an employee based on criteria other than his or her job description. Unfortunately many job descriptions aren't kept up to date. As employees are added and responsibilities are divided, job descriptions need to be updated.

In addition, staff members often need clarification regarding the expectations placed on them. People normally try to live up to expectations, so these need to be clear. According to *Church Staff Evaluation: A Tool for Effective Performance* by Joyce Parchman (Nacba Press, 2001), job descriptions help prevent misunderstandings, create a feeling of trust, and make it



possible to present a great deal of organized, pertinent information about each position quickly and concisely.

Provide Staff Opportunities for Growth

Most employees want to know how they can do a better job. Regular staff evaluations provide this information to them. The key is to connect analysis to development. To do this, both the supervisor and employee should assess the employee's strengths and weaknesses and bring this assessment to the evaluation meeting. Compare the two lists, and use the issues you differ on as a springboard for discussion, goal setting, and growth.

Growth becomes a reality only when both parties agree on a set of goals that will enable the employee to improve. Once an agreement is reached, it is the supervisor's responsibility to provide opportunities to help reach those goals, which may include training seminars or classes.

Establish a Compensation Plan

Many churches give all staff members, regardless of job performance, the same annual compensation increase, which is usually a percentage based on inflation rates and/or the church's current financial condition. This method may require less time and energy, but it also fosters numerous staff issues.

If you give the same increase to all employees regardless of performance, consider this: Using the across-the-board percentage method doesn't encourage mediocre employees to try harder, and it doesn't persuade top-notch employees to keep up the good work. Author Jerry Jensen, in *Employee Evaluation: It's a Dirty Job, But Somebody's Got to Do It* (The Grantsmanship Center, 1980), says, "People feel good about themselves and their employer when they do things that stretch their abilities and when they get recognition for those achievements."

If you desire to improve employer–employee communication, clarify job descriptions, train staff for growth, and provide a means by which your church can compensate objectively. The process of creating and implementing a staff evaluation program should rank high on your to-do list.

—Stephen Dees is associate pastor of education and administration at First Baptist Church, Wilmer, AL, and president of Dees Administrative Ministry Consulting. Article used by permission from ChurchExecutive.com.

Ministry Review of Objectives and Goals of past year

Purpose: To encourage and affirm each staff person and establish more effective communication between staff and church leadership, and to design clear, realistic goals and objectives for the upcoming year.

This form is to be filled out by the one being reviewed: (Name)

Part I. JOB DESCRIPTION

- Include your Job Description as the next page in this document.
- Read through the Job Description and make any comments or suggested changes, as desired.

Part II. GOALS AND OBJECTIVES of the past year

For _____ through _____
(month) (year) (month) (year)

NEW GOALS AND OBJECTIVES:
(New initiatives from the past year)

Progress: _____
(Review Date)

- 1.
- 2.
- 3.

RE-ESTABLISHED GOALS AND OBJECTIVES:
(Renewed initiatives)

- 1.
- 2.
- 3.

PROFESSIONAL DEVELOPMENT or OUTSIDE MINISTRY
(Schooling or additional ministry opportunities)

- 1.
- 2.
- 3.

GOALS AND OBJECTIVES for the coming year

For _____ through _____
(month) (year) (month) (year)

NEW GOALS AND OBJECTIVES:
(New initiatives for the following year)

Progress: _____
(Review Date)

1.

2.

3.

RE-ESTABLISHED GOALS AND OBJECTIVES:
(Renewed initiatives from a previous year)

1.

2.

3.

PROFESSIONAL DEVELOPMENT or OUTSIDE MINISTRY
(Further educational or additional ministry opportunities)

1.

2.

3.

Performance Appraisal for Pastoral Staff

(Keep written answers brief but clear enough to open discussion with your supervisor.)

Ministry Change(s)

1. Did you find yourself involved in: (mark those that apply)

Major change Minor change No change Need for change

2. What change(s) this year have been encouraging? _____

3. What change(s) this year have been difficult? _____

4. What change(s) would you like to see accomplished? _____

5. Additional comments on changes experienced or needed: _____

Communication

1. Do you feel your area of ministry has been well identified and/or communicated to the:

Staff? Yes Somewhat No

Church body? Yes Somewhat No

Within your area? Yes Somewhat No

As a staff:

2. Where or how would you like to see communication improve or increase? _____

As a church:

3. Where or how would you like to see communication improve or increase? _____

In your area of ministry:

4. Where or how would you like to see communication improve or increase? _____

5. Is there any way in which your supervisor or pastor could be of better help to you in your work?

If so, please describe. _____

6. Is there any way in which your fellow staff members and lay leadership could be of better help to you in your work?

If so, please describe. _____

7. What goals would you like to set for yourself for the next year? _____

8. In general, how would you evaluate your performance over the past year? _____

To what extent were last year's goals met? _____

9. Is there anything in particular you would like to discuss with your reviewer?

If so, please explain. _____

Questions in Major Categories of the Musician's Work

People Skills/Working Relationships

Which areas do you feel are your strengths and which areas need improvement?

- Relationships with clergy and other staff.

- Relationships with and supervision of other music staff, paid and volunteer.

- Planning for worship and other activities:
 - How frequently do you meet with others involved with planning?

 - Is it enough?

- Relationships with choirs and/or worship teams:
 - Level of satisfaction, support?

 - Recruitment and response?

 - Ministry, including awareness of and response to personal situations affecting individuals?

- Relationships with congregation:
 - Level of satisfaction, support?

 - Providing opportunities for education and outreach?

 - How do you see your "musical fit" with the congregation?

What were your accomplishments in these areas during the past year?

What specific goals do you have for the coming year?

Music/Worship Skills

Which areas do you feel are your strengths and which areas need improvement?

- Your level of preparation and practice for rehearsals and services.

- The variety of music experiences that you provide.

- Your ability to adjust to the changing character of the staff or congregation.

- Your development of musical resources in the church.

- Your professional development.

- The leadership you give in vocal and choral training.

- Your knowledge of hymns and choruses and your ability to lead the congregation in singing.

- Your knowledge of the liturgy and worship traditions of this faith.

What were your accomplishments in these areas during the past year?

What specific goals do you have for the coming year?

Performance Appraisal for Musicians

The following form provides guidelines only.

Users are encouraged to adapt and reformat this form to serve their own needs.

Name and position title _____

Date hired _____

Review date _____

Date of last review _____

The following items are to be completed by the musician:

1. Does your current job description/contract adequately match the work you are required to do?

If not, how should the job description be changed? _____

2. What have been your accomplishments and successes in the past year? _____

3. What aspects of your work do you especially enjoy or find rewarding? _____

4. What aspects of your work do you enjoy the least? _____

What changes would you like to see with regard to these concerns? _____

Business/Administrative Skills

Which areas do you feel are your strengths and which areas need improvement?

- Your ability to plan, defend, and work within a budget.

- Meeting deadlines for newsletters, worship bulletins, etc.

- Your stewardship of the church's music and maintenance of the music library.

- Care and maintenance of instruments.

- Meeting contractual and licensing obligations.

- Hiring other musicians such as substitutes and instrumentalists.

- Planning concerts and other special programs with the attendant publicity.

- Necessary custodial work.

What were your accomplishments in these areas during the past year?

What specific goals do you have for the coming year?

A Step-by-Step Church Staff Review Guide

December 19, 2012 — 8 Comments

As I mentioned in my last post, staff reviews are thought by some to be intrinsically miserable and somewhat useless. They really don't have to be. They can actually be a time staff looks forward to. I was reviewed for more than a decade in a way similar to what I describe below by elders at the churches I served. I never received a poor review, and only once did I ever feel any elder tried to use a review punitively. Thankfully, he was outnumbered by others who saw the job I was doing differently. I say this because I want you to know what I'm laying out below isn't rooted in nightmarish review scenarios of my own. However, those of some of my colleagues have impacted how I think about reviews.

Not counting interns, I've done somewhere around 150 pastoral staff reviews. I review every minister and every support staff person. As I've gone along, I've tried to add certain components I felt were missing from my own reviews. I also took away things I believe created unnecessary anxiety in staff. I've never "outsourced" staff reviews to someone else. One year, that meant doing nearly 30 of them myself over a 3-week period. It was somewhat exhausting and obviously a sacrifice of time—but *soooo worthwhile*. Staff reviews are an extremely valuable ministry tool for the reasons I described in my last post.

I know there are some better ways out there. Here's how I do it.

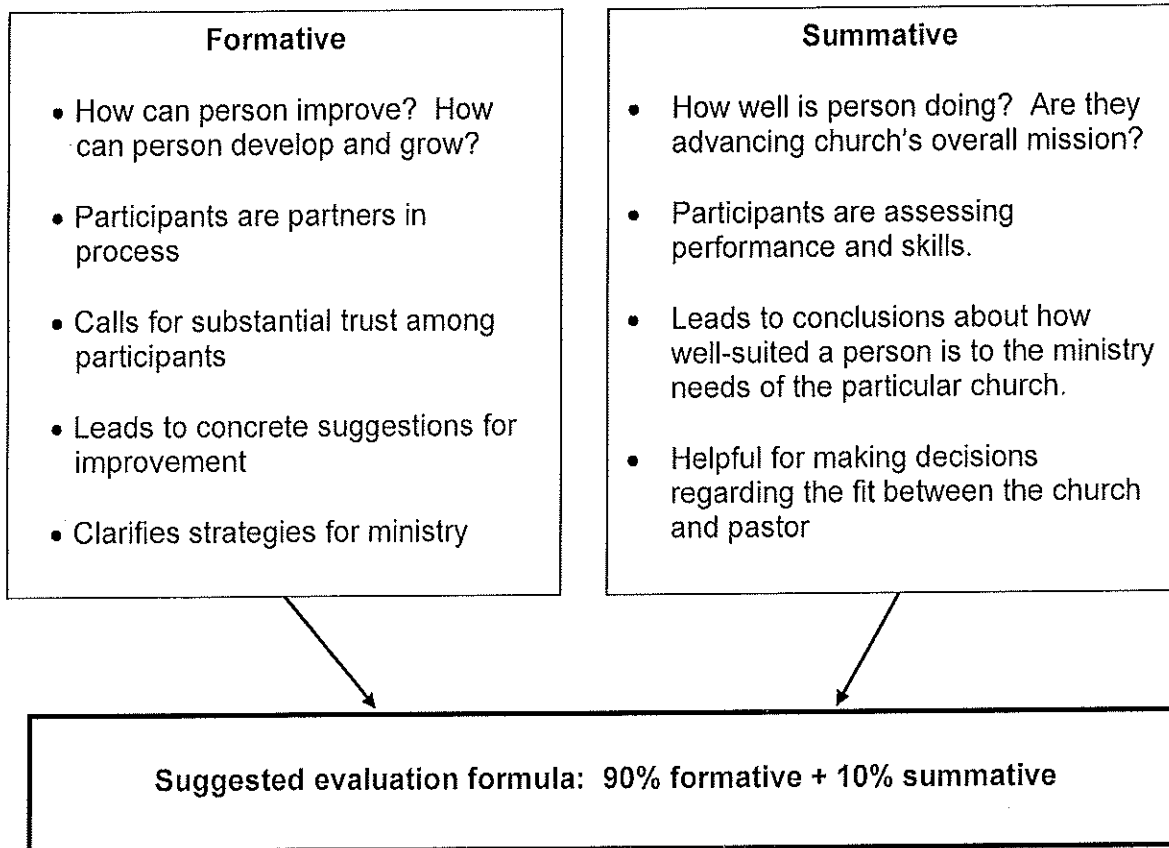
1. **Choose the right setting.** I used to do reviews in my office. The upside was it was professional and clarified our respective roles on staff. However, I also found it to be an emotionally sterile environment. People would listen to me, but not talk. Now, I nearly always do them over a meal at a restaurant the staff member likes. It starts things off on the right foot and sets the table for 2-way conversation. It's just harder to argue or be defensive over chips and salsa. Plus, the free lunch is a gift unto itself.
2. **Make sure you have enough time, but not too much time.** If you have a staff of under 10 people, 2 hours is about right. If you have too little, you may cut important conversations short. If you go too long, you'll waste an entire month on reviews, and it means someone is probably dominating the conversation. Because of the desire to break bread with staff as we talk, I typically choose a long lunch hour.
3. **Have a clear purpose.** The three purposes of our staff reviews are: 1) for them to leave knowing how the church feels about the job they're doing, 2) For me to hear from them what they need to go to the next level, and 3) For us to go away closer to one another and more dedicated to our ministry than when we sat down. The flow of the meeting typically goes in that order.
4. **Have a good tool.** Don't just sit and have a chat. Put some serious thought into the finer points of how they're doing and write it out. I use a written evaluation tool I've attached to this post. You can click the link at the bottom. I'm adapting this quite a bit for use at NVC. However, since most of my readers serve in established churches rather than church planters, I've included an older edition from my days in established churches. I "grade" the staff member in all thirty areas on a 1-to-5 scale, and I use whole numbers (no decimals). Fives are off the charts, and anything under a three must be addressed by March 1 of the next year or further action will be taken. The base is taken from a tool given to me by my mentor and professor, the late Dr. Charles Siburt. I've changed some of the wording, etc. He would have no problem with me giving this out, as he gave it out freely to hundreds of churches all over the country. I hope you find it helpful. The language of "Character, Competency, Chemistry" is taken from Bill Hybels' terrific book, *Courageous Leadership*. After the thirty points, there are three short write-in sections. One to tell them what they are excelling at. One to give them

"next level" recommendations. One to summarize and affirm again. We will begin using the adapted version of this tool in the coming year.

5. **Be specific.** Don't just say, "You're doing a great job," or "We need you to work on your relationships with your teammates." Tell them how...**exactly**. I go through the aforementioned 30-points quickly, highlighting any fives or threes, and noting which of the three categories they are excelling in (Character, Competency, Chemistry). But, wherever I comment, I try to be specific and ask for their perspective too. "Do you feel like your relationship with Meagan is getting better or worse?" Wait for their answer and really listen. Then, respond with your own, *specific* observation.
6. **Give them the Mic regularly throughout the conversation.** Ask questions throughout, and especially the three below.
7. **Do not surprise them.** Whether praise or correction, a review should never be the first time you've told them.
8. **Ask these three questions and really listen to the answers (this is the most important part of the entire review—the listening):** 1) Is there anything you want or need to take your ministry to the next level? 2) How can I be a better ministry partner to you? 3) What one thing can I do to make your ministry more fun or fulfilling? I've had staff members give me stuff that was absolutely priceless in this section. One asked for financial help getting marriage counseling (I had no idea their marriage was struggling). Another confessed she was hurt when she didn't get Thanksgiving off because her late husband died on Thanksgiving Day (I had no idea as a brand new minister). I've had people apologize for the job they did over the year and give genuine (non-fabricated or high-drama) explanations that reshaped how I saw them as a worker.
9. **Be Generous.** If we are able to give raises, I like to give raises at review time. This is for two reasons: 1) It's Christmas time and they can plan better financially knowing how their pay is going to look going forward. 2) I want them to know we're glad they serve the Lord at our church. Ministers are always hesitant to ask for raises. So, do it for them. When we can't give raises or one isn't merited, I still want to have something to give them—a gift card for a night away with their spouse, etc. *Evernote* pays to have all of their employees houses cleaned twice. Some churches think the humbug approach is better—give the 1% raise every three years *if you have to*. Bleh. That's a recipe for low morale and high turnover. I understand if the church can't do it, they can't do it. I've been there. However, if you can do it, you should do it for those who deserve it. Come January, you're going to be a lot better off with motivated, high-morale ministers not worrying about money.
10. **End with the heart-felt and positive.** Don't leave them with, "We appreciate the job you've done this year." Leave them with something that lets them know you really believe in them, trust them, and are glad you have the blessing of working with them individually.

Resources for Pastoral Relations Committees

Types of Evaluation



Two Purposes of Evaluation

- Examine the effectiveness of the church in achieving its mission.
- Examine the effectiveness of the pastor (staff) in leading the church toward the fulfillment of the mission.

Some Steps in Evaluation

- Gather appropriate information.
- From a thoughtful assessment of the information, decide what feedback will be shared, by whom, and how.
- Present the affirmations and areas for growth.
- Thank those from whom information was sought and indicate that it was helpful in the recently completed review.

Resources for Pastoral Relations Committees

Effective and Ineffective Pastoral Relations Committees (PRC)

Characteristics of Effective and Ineffective PRCs

Effective	Ineffective
<p>Meet regularly and often</p> <p>Prepare for meetings</p> <ul style="list-style-type: none">• Have an agenda• Stay focused on agenda and identify topics for future meetings• Allow adequate time <p>Establish partnership with pastor</p> <ul style="list-style-type: none">• Keep pastor informed• Take pastor into confidence• "We are in this together" attitude• Provide support and understanding	<p>Conduct annual evaluations only</p> <ul style="list-style-type: none">• Withholds regular feedback• Lets issues build too long• Related to salary and appointment decisions more than to growth <p>Allow too little time and care</p> <ul style="list-style-type: none">• Insufficient time to do task well• Insufficient care in getting input and preparing for evaluation <p>Behave unfairly</p> <ul style="list-style-type: none">• Bringing unevaluated complaints• Bringing anonymous complaints• Giving all sources equal credibility• Doesn't put issues in perspective

What PRCs and Clergy Most Need from Each Other

<i>PRCs Most Need from Clergy</i>	<i>Clergy Most Need from PRCs</i>
<p>Cooperation and receptivity</p> <ul style="list-style-type: none">• Willing to listen with open mind• Attempt to understand members' needs and concerns• Attempt to make some changes• Openness to improvement ideas <p>Clear and open communication</p> <ul style="list-style-type: none">• Pastor's vision for ministry• Candid assessment of what is going on in the church• Information about issues and needs	<p>Honest feedback</p> <ul style="list-style-type: none">• Balanced, objective, thoughtful, and candid feedback• Treated as adults who can take criticism <p>Personal concern and support</p> <ul style="list-style-type: none">• Advocate for pastor <p>Communication with the congregation</p> <ul style="list-style-type: none">• Education of congregation• Feedback from and to congregation

Based on a comparison of pastoral relations committees deemed effective by both the PRC chair and the pastor and those deemed ineffective by the chair and pastor.

Ministry Person's Name:

January 15, 2013

Using a 1-5 (5 being highest), rate each component.

Ministry Competency:

- _____ 1. Maintains a clear vision/purpose for his/her ministry at [Church Name]
- _____ 2. Sets appropriate ministry goals and develops effective plans to reach ministry goals.
- _____ 3. Demonstrates consistent follow through with regard to the execution of ministry plans.
- _____ 4. Demonstrates a solid level of understanding and knowledge in his/her ministry area(s).
- _____ 5. Demonstrates an ability to accurately assess ministry needs and ministry effectiveness.
- _____ 6. His/her ministry area demonstrates an appropriate balance of breadth and depth.
- _____ 7. Demonstrates creativity and initiative in his/her practice of ministry.
- _____ 8. Demonstrates an awareness and understanding of the role his/her ministry plays within [Insert Church Name]' overall mission and vision.
- _____ 9. His/her ministry is informed and guided by a solid Biblical/theological foundation.
- _____ 10. His/her ministry is characterized by excellence and high quality.

Relational Chemistry:

- _____ 1. Effectively relates to different groups and types of people within the [INSERT CHURCH NAME] family.
- _____ 2. Effectively communicates with others.
- _____ 3. Manages and handles conflict in an effective manner.
- _____ 4. Effectively relates to his/her primary ministry group or constituency.
- _____ 5. Effectively recruits and empowers others to utilize their gifts in ministry.
- _____ 6. Effectively equips, supports, and supervises workers in his/her area of ministry.
- _____ 7. Motivates and inspires others to deepen their faith and increase their commitment to discipleship.
- _____ 8. Demonstrates an ability to work well with the [INSERT CHURCH NAME] staff.
- _____ 9. Demonstrates an ability to work well with [INSERT CHURCH NAME] elders.
- _____ 10. Demonstrates a willingness to be accountable to others.

Character and Spirituality:

- _____ 1. Models a strong commitment to lifelong spiritual development and discipleship.
- _____ 2. Pursues purity and holiness as a lifestyle.
- _____ 3. Effectively responds to the needs of his/her family.
- _____ 4. Manages personal and church financial resources effectively.
- _____ 5. Understands and manages personal boundaries effectively.
- _____ 6. Receives feedback and correction in an effective manner.
- _____ 7. Consistently demonstrates strong work habits (timeliness, meets deadlines, office hours, respect for policy, support of co-workers, etc.)
- _____ 8. Demonstrates servant leadership.
- _____ 9. Recognizes and appreciates diversity within the [INSERT CHURCH NAME] family.
- _____ 10. Is truthful and accurate in his/her communication.

