Ministry and Personnel Committees:
Annual Performance Reviews

The United Church of Canada
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Contents

The Annual Performance Review Process

The annual performance review process is established by the M&P Committee. The performance review is intended to be a healthy process, which facilitates two-way communication between each ministry personnel or lay employee and the community of faith.

Supervision can have a significant impact in helping staff understand their role, their value to the church, and the contributions they make. Good supervision will help staff to grow and appreciate their gifts and strengths. As supervisors, members of the M&P Committee must offer mutual respect, guidance, support, motivation, and the leadership needed to foster the growth of ministry personnel and lay employees. There should be no "surprises" at the performance review, as any prior issues should have been resolved at the time they occurred.

The first step of the performance review process is the setting of goals for the year. The performance review process can encourage growth when it is a mutual evaluation of both staff and the pastoral charge. In this model, both the governing body and the staff set goals for the year. The performance review of staff would happen at the same time as a review of the community of faith's goals.

Goals are most helpful when they are realistic. The SMART goal formula can be a good guide to establish goals. A SMART goal is **S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**imely.

To begin the performance review, information is gathered concerning the work of each ministry personnel or lay employee as it relates to the mission and goals of the community of faith. Questionnaires might be circulated or interviews conducted with the individuals and committees with whom the ministry personnel and lay employees work most closely, for example, the Property Committee in the case of a caretaker, or various committees for ministry personnel. Ministry personnel and lay employees can be consulted in the same way.

Once the information has been gathered, it is reviewed, confidentially, by the M&P Committee with each ministry personnel or lay employee. In multiple staff team situations, it is also beneficial for the ministry personnel and lay employees to meet together with the M&P Committee to review working relationships.

At the performance review, existing goals are reviewed and new goals set; feedback should be clear, specific, and non-judgmental.

The annual performance review considers the relationships between ministry personnel and lay employees, as well as the relationships between ministry personnel and lay employees and all of the groups and individuals to whom they relate in the course of their ministry. The performance review also offers the opportunity for the M&P Committee to ensure that the community of faith is fulfilling its obligations to all staff.

During the course of the performance review, matters may arise that should be referred to the governing body or another committee for resolution. The M&P Committee consults with the ministry personnel or lay employee regarding issues to be referred elsewhere.

Recommendations arising from the performance review are recorded and shared with all parties concerned, and then reported to the governing body. Where there is disagreement about a recommendation, every effort should be made to reach a common understanding before reporting to the governing body.

Recommendations should be specific and include clear expectations of both the ministry personnel or lay employee and the M&P Committee. Decisions made by the governing body on recommendations from the M&P Committee should be communicated to the ministry personnel and lay employees and recorded in the personnel files.

A mutual annual performance review process can be a fruitful journey. This evaluation process is about equipping staff and lay members for God's call to the community of faith. It is about strengthening ministry. It is about building up the body of Christ.

Checklist for a Good Performance Review Discussion

A good performance review discussion should

- ☐ focus on performance against set goals
- ☐ be a mutual evaluation of staff and the community of faith
- ☐ be regularly scheduled and simple
- ☐ build on what the employee is doing well
- ☐ motivate the employee
- ☐ find ways to help the employee grow
- ☐ not be conducted when major conflicts are present
- ☐ be timed separately from a review of compensation
- ☐ provide written feedback following the review

Sample Annual Performance Review

Each M&P Committee should establish, with the agreement of ministry personnel and lay employees, an evaluation procedure for conducting the annual performance review. The model below can be a starting point—feel free to modify it, or develop your own to suit your situation.

The starting point of any review is the goals and objectives ministry personnel and lay employees have adopted for the year, which must be congruent with the mission and goals of the community of faith. Not all aspects of ministry are easily measured, but with careful planning, an annual review can be beneficial to all participants.

Issues to be reviewed by the M&P Committee

a) With each ministry personnel and staff member:

- What progress has been made on your goals and objectives for the year? What has helped or hindered progress?
- Which goals and objectives are still valid? What needs to be done to accomplish them? Do some need to be revised or deleted? Should new ones be added?
- What strategies will enable you to attain your goals and objectives? How can the M&P Committee or the community of faith assist you?
- What areas of your work do you find most satisfying? most frustrating? How can we work together to alleviate the frustration?
- How do ministry personnel and staff keep each other informed? What helps or hinders ministry personnel and staff working together?
- Do you have any health and safety concerns about the workplace? Do you feel safe and secure?
- Do you have the equipment you require to do your job effectively?

b) With ministry personnel:

- What is your level of satisfaction with your salary, continuing education, administrative support, and other benefits and working conditions?
- How consistent is your position description with the community of faith's expectations?
- What are your priorities for ministry in the coming year? What effect will this have on your ministry with us?
- What is your vision for the community of faith for the coming year? How does it relate to the community of faith's goals and plans? What skills and resources would be required of members?
- How can this committee support you in your ministry with the community of faith?

c) With lay employees:

- What is your level of satisfaction with your salary, benefits, working conditions, vacation time, and professional development opportunities?
- Does your position description provide a clear understanding of the pastoral charge's expectations of your work?
- What other expectations does the community of faith have of you besides those defined in your position description? What additional responsibilities would you welcome? What aspects of your job do you feel should not be your responsibility?
- How does the community of faith express support for your work?
- How can this committee support you?

Issues to be reviewed with the M&P Committee

a) By each ministry personnel and lay employee:

- How have I been effective in fulfilling my responsibilities and in achieving my goals and objectives? How have I helped facilitate the community of faith's goals and objectives?
- To be more effective, what skills do I need to acquire or improve upon?
- How would you say I balance the time required to perform my various duties? The time for work and for my personal life?
- What would you encourage me to continue doing? Start doing? Stop doing?

b) By ministry personnel:

- Spiritual growth that has been significant for me during the past year includes...
- How do you see my relationships with other staff members? With individuals, families, and groups in the community of faith and the community?
- Discuss my involvement with the governing body, committees, choir, volunteers, etc.
- How has my involvement in worship, education, preaching, and administering sacraments, outreach, and pastoral care been received? Where would people welcome or resist change? Where is special attention required?
- What feedback is there from the community of faith? How important is it? What response, if any, should be made?

c) By lay employees:

- How do you see my relationships with other staff members? With members of the community of faith?
- What feedback have the committees to which I relate in my work given?
- During the year I have tried to do the following "special things." How have these things been received? recognized? evaluated?
- Does the community of faith have any other feedback about my work?

While performance reviews need to be done annually, they do not have to be in depth every year. A shorter performance review for ministry personnel and lay employees could include a conversation around these questions:

- What is going well?
- What is going off the rails?
- What is the action plan?

or

- What do we need to do more of?
- What do we need to do less of?
- What is the action plan?

Resources for Giving and Receiving Feedback

The M&P Committee helps to ensure a climate in the community of faith where constructive feedback can be offered and received in a positive way. The M&P Committee ensures that when feedback is offered about work performance, it is done to allow for direct discussion, explanation, improvement, or change.

Thanks to the Centre for Christian Studies for permission to share these feedback best practices from its Student Kit 2023–2024.

Effects of Feedback

Feedback can have the following helpful effects:

- *Reinforces*—Feedback may confirm behaviour by encouraging its repetition. "You really helped when you clarified that."
- *Corrects*—Feedback may help bring behaviour in line with intention. "It would have helped me more if you spoke up louder from the pulpit."
- *Identifies*—Feedback may help identify persons and their relationship. "Joe, I thought we were enemies, but we're not, are we?"

Feedback is best when

- it is *descriptive*, rather than judgmental. By describing one's own reaction, it leaves the individual free to use it or not to use it as they see fit. By avoiding judgmental evaluative language, it reduces the need for the individual to react defensively.
- it is *specific*, rather than general. To be told "you did a great job" is too general to be useful. Say, for example, "The way you organized the agenda really helped us to make decisions."

- it is *appropriate*, by taking into account the needs of both the receiver and giver of feedback. Feedback can be destructive when it serves only the needs of the one who gives the feedback and fails to consider the needs of the person on the receiving end. It needs to be tailored to the situation, to be considerate of the circumstances of the receiver, and to be given in a supportive way.

- it is *usable*, rather than out-of-reach. Feedback needs to be directed toward behaviour which the receiver can do something about. Frustration is only increased when a person is reminded of some short-coming over which they have no control.

- it is *well-timed*. In general, feedback is most effective when it is given at the earliest, appropriate opportunity after the action or behaviour has been observed. Timing also includes a sensitivity to the person's readiness to hear it and to surrounding circumstances. For difficult feedback, ensuring that there is support available may be important.

- it is *clear and honest*. Feedback is not helpful when it is given so carefully and cautiously that the point is lost. Giving it straight out is the best policy. That way, the receiver does not need to second-guess what is being said and why it is being said. One way of checking to ensure that the communication has been clear is to ask the receiver to rephrase it to see if the feedback received corresponds to what the sender had in mind.

- it is *requested*, rather than imposed. Feedback is most useful when the receiver formulates a specific question or solicits a response. Of course, through the very act of placing oneself in a learning situation the receiver indicates that feedback is both essential and welcome.

- it *represents a commitment to growth*. Feedback is best when it is offered out of a commitment to the person. The intention of feedback is to help the other learn and grow. This means that the giver of feedback needs to be prepared to relate on an ongoing basis and offer further comments to indicate improvement over time.

How to Give Feedback

A frequent error in giving feedback is to be too general. Helpful positive feedback needs to be clear and concise. The following example could be shared in an M&P Committee meeting.

1. *Introduce the conversation:* For example, "I would like to give you some positive feedback about the children's time you led in last week's service."

2. *Describe the behaviour and context*: For example, "I noticed that you had the children's attention throughout. Your voice was inviting and animated without being patronizing or overly dramatic. Your sincerity and affection for the children were evident in the way you offered them eye contact and took their questions

seriously. And you were able to be firm, but kind when you asked the young boy not to bang his feet because it made it hard to hear and it was distracting."

3. *Share impact of the behaviour*: For example, "I can relax when you offer leadership for the children's time. I know that you are confident and can handle the spontaneity of the children without being flustered or overwhelmed. I am deeply grateful that you treat them respectfully and listen to them. I think that is a great model for all of us who take our turn doing the children's time."

Supportive Climates

All of us need positive feedback. In the best-case scenarios, the community of faith setting will establish supportive climates. A supportive climate is characterized by the following:

1. Feedback is descriptive, not evaluative or judgmental. Events are described in objective terms.
2. Feedback is not an issue of control or imposing of one's own view but focuses on the problematic behaviour not on the person.
3. Feedback tends to be spontaneously expressed in a straight forward, honest fashion. People are open about their viewpoints and opinions and don't have hidden agendas or secretive motives.
4. Feedback is respectfully offered with empathetic attention to the other person's feelings, problems and value system. The other person's worth is affirmed.
5. Feedback is not a matter of "pulling rank" and is not offered in a competitive atmosphere which sets up comparisons in ability and status.
6. Feedback is tentative in nature. It is not overly certain of its correctness or its point of view.

Preparation for Giving Feedback

Before giving feedback, especially when it is critical or difficult, it is crucial to do some reflection in preparation.

1. Determine the best time and place, such as an M&P Committee meeting
2. Identify the readiness of the person to receive feedback

   ☐ Was the feedback requested explicitly or implicitly?

   ☐ Was the feedback not requested?

3. Reflect on your motivation

   ☐ Am I interested in the other person's well-bring? Growth? Future?

   ☐ Am I angry? Seeking revenge? Wanting my own way?

4. Reflect on the power dynamic of the situation

☐ In what ways is the other person vulnerable?

☐ In what ways do they have power over me?

5. Prepare yourself to match the tone, style and language of the other person

☐ Develop strategies so that the other person can hear and understand your feedback

6. Identify how you will introduce the conversation

☐ "We want to give you feedback about…"

☐ "What we have noticed is…"

☐ "We would like to share our observations about last week's worship…"

7. Describe the behaviour without judgment

8. Practise

☐ if necessary, write out what you will say face to face

☐ rehearse by yourself or with a trusted colleague

How to Receive Feedback

There are helpful and less than helpful ways to respond to feedback. The steps described below provide some appropriate guidelines for receiving feedback with maturity and grace.

1. Check Out the Comments

☐ repeat back the feedback and your understanding of the problematic behaviour

2. Ask Clarifying Questions

☐ make sure that you have understood to the satisfaction of the one who offered the feedback

3. Do Self Talk

☐ tell yourself that you can handle criticism

☐ wonder about the situation and practice being curious

☐ prompt yourself to listen and not interrupt

4. Thank the Person

☐ demonstrate appreciation for the commitment to relationship and learning

☐ remind yourself that this is likely a stressful situation for the other person too; it may have taken considerable courage to offer feedback

5. Identify Next Steps (if any)

☐ promise to think about the feedback

☐ be clear about what is being requested of you

☐ brainstorm alternative approaches or behaviours

☐ consider making appropriate changes

When receiving feedback, do *not*

1. over-explain

   • clarify in a sentence or two but learn to stop

2. use this as an opportunity to give your own feedback

   • it may become escalating retaliation

3. become silent or shut down

   • which may be perceived as petulance or resistance

4. blame others

   • accept your responsibility

5. make excuses

   • it only appears defensive and as if you are not taking the feedback seriously

Intercultural Considerations

Feedback is most constructive when it takes intercultural considerations seriously. Each individual brings their own cultural norms to a feedback conversation. As well, there may be an organizational culture with its own norms, often unexamined.

In some cultures, regular positive feedback is expected. In others, only extraordinary accomplishments would be acknowledged with feedback. A conversation about cultural norms is important at the beginning of a relationship which will include feedback. Is oblique feedback considered polite and direct feedback rude? Is saving face important in the context? How does age or status impact offering and receiving feedback? Some learning may be required to gain cultural fluency.