

Process for Staff Reviews, UUCC 2012

The following is a proposal for conducting yearly staff reviews. The proposed process was crafted with consideration of “Assessing Our Leadership: Promoting Effectiveness in Congregational Leadership,” a document created in 2001 between a partnership of the Unitarian Universalist Ministers' Association, UUA District and Extension Services, the Liberal Religious Educators' Association, and the UUA Department of Ministry.

The reason for a performance evaluation for any staff person, paid or volunteer, is to allow for a process of accountability and to offer useful and considerate feedback as to the performance of the job. The process of our congregation strives to keep faith with our covenant in all our interactions, including performance evaluation. In a mutual process of reflection, each staff member will be treated with dignity and respect and with the goal of seeing both the staff member and congregation flourish within the working relationship. **The assumption of the review process is that quality feedback is essential to the healthy development of any professional, and that a good review process will produce great outcomes for the professional staff and the congregation.**

The proposed process would proceed as follows:

- Before the end of September in each church year, the individual staff member, in consultation with her/his supervisor and with regard to the identified mission and goals of the congregation as articulated by the Board, will create a list of 2-5 goals for the year. These goals should be framed so as to both express the *ministry* component – what aspect of ministry does this goal serve? - as well as some suggested measurable elements by which “success” could be understood. Additionally, these goals should conform with current job descriptions unless there has been an agreed-upon departure from the job description, which must be reconciled before the next goal-setting period. There should also be assessment as to what resources will be needed for success in each goal.
- Between mid-January and mid-March, there will be a mid-year review of the goals & staff performance. The purpose of the conversation is to ascertain how progress is being made with regard to the specific goals, to identify any challenges or hindrances, and to assess whether each goal continues to maintain priority. It may be that at this meeting, a goal is dropped and a new one identified. The primary conversation at this point will be between the staff person and her/his supervisor. Additionally, in this window, the staff person will offer the names of two individuals in the congregation, with whom the staff person regularly works, to be approached with an agreed-upon set of 2-3 questions about a specific aspect of church work that relates to the staff member. **Also at this time, independent of the mid-year review process,** the Compensation and Benefits committee will draft and make its recommendations regarding salary & other compensation. It is expected that the C&B committee would be in conversation with the supervisor regarding whether the current job description and job expectations can be accomplished in the time allotted, or whether any recommendations should be made in expanding hours or amending the job description or allocating different or additional resources. These processes are separate because in our congregations, salary is not directly tied to job performance and the creation of a budget demands mid-year consideration of resources.
- In early May, prior to the annual meeting, the staff and supervisor will have a formal year-end review. During this process, a thorough review of the goals will be considered; additionally, the staff person will prepare a written self-evaluation to join the supervisor's written evaluation – and these will be shared mutually. The focus of the evaluation should be to identify areas of success, areas where there may be challenges, and suggestions from staff member & supervisor about how best to continually improve, with the assumption that growth and development are always ongoing. For director positions (Director of Religious Education, Music Director) part of this review will include the supervisor inviting feedback on the staff member's performance from 3-5 people in the congregation. These people should be sought from different areas of the church, and invited to share their impressions based on questions designed in relationship with the director. The goal of this external feedback is to create mechanisms within the congregation whereby we are constantly considering the health and vitality of our programs and direction, both in their professional oversight and their lay development. For non-director positions, the supervisor will determine, in conversation with the staff member, whether seeking additional input from others in the congregation would be useful to the review process.

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- Staff reviews are considered confidential and should be kept in an employee file in the Minister's office.
- In the event that a particular staff member's performance ever warrants separation, this conversation would be conducted in an executive session of the Board, and every reasonable attempt should be made to include the staff member in conversation prior to any decision regarding continued employment.