

★ **The Episcopal Diocese of Texas**

STAFF PERFORMANCE REVIEW FORM

## INSTRUCTIONS

The purpose of the Staff Performance Review is to provide an opportunity for reflection, valuation, and discussion of the overall work of church staff in the Episcopal Diocese of Texas. This performance review is designed to be used in an open, two-way communication format, highlighting achievements and strengths, as well as underutilized capabilities and opportunities for development. The spirit of the review is intended to be prayerful, supportive, and enlightening. The review should be carried out in awareness of its spiritual context.

The evaluation is to be carried out by the Rector, Staff Member to whom the person reports, or Senior Warden with input from other people selected by the staff member being reviewed and by the reviewer.

The review process includes the following:

### 1. Preparation.

- Set a time for the review, and agree on the period under review.
- Describe the key focus of work for the review period on page 2 of the form, including any specific goals or objectives for the period of time under review.
- Review Sections 1 and 2 of the form and agreed upon those factors appropriate to the job under review, or modify the list prior to the completion of the form.
- Together, select 3 to 5 people who will provide input on performance of the staff member being reviewed. Those providing feedback may include co-workers, those served by the staff person, volunteers working with him or her, or leaders in the congregation. However, only those who have extensive knowledge of the person's work and capabilities should be asked to provide input.
- The Reviewer (Rector, Vicar, Manager, or Senior Warden) solicits input as designed. This may be in person, by phone, or by e-mail.
- Other materials related to the congregation's values, mission, and vision may be reviewed as part of the context of the evaluation, to discuss ways in which the staff person's focus and work have supported these.

### 2. Form Completion

- The person being reviewed completes the assessment of their work carried out in the period under review and transmits their comments to the reviewer. Comments should be descriptive and include specific examples. Electronic completion and transmittal is recommended so that all comments will appear on the same form at the conclusion of the process.
- The Reviewer solicits input from the agreed upon individuals, requesting that input should be given prayerfully, honestly, and in a supportive tone.
- The Reviewer then provides his or her comments on the performance, and includes comments from others giving feedback. Again, comments should be descriptive and include examples.
- The form is then returned to the person being reviewed prior to a face to face meeting.

### 3. Review Meeting

- The Reviewer (clergy or other) and staff member being reviewed meet in a location conducive to open dialogue for a period of about one hour.
- All elements of the review are discussed to ensure that both individuals have an opportunity to express their perspectives on the work being reviewed. It is not necessary for the two people to agree, but both should seek to understand the other's perspective on the performance as well as development opportunities.
- Open the meeting with a reflection, prayer, a Psalm or some other reading that sets the discussion in a spiritual context.

- Either party may wish to modify comments or ratings as a result of the discussion. In that case, the document is re-sent and the final copy is signed.
- Both the Reviewer and the staff person being reviewed sign in the boxes on the final page, indicating that the review has been conducted. If there is not agreement, the person being reviewed should check the box indicating disagreement.
- If there is significant disagreement, further input may be sought from a wider range of congregants or staff, a memorandum citing reasons for disagreement may be attached, the review may be escalated to a mutually agreed upon third party within the congregation or Diocese, and/or a request may be made for re-review in 3 to 6 months with the option to replace the current review if changes so warrant.

4. Follow up

- A copy of the review is kept by both the staff person and the reviewer, and a third copy is filed in a sealed confidential file in the church office. This is a confidential document and should be treated as such.
- A follow-up meeting should be held 3 months after the review to discuss how things are going with regard to any agreements reached about support, development, educational opportunities, or desired changes.

NAME OF PERSON BEING REVIEWED:	REVIEWER/S:
DATE OF REVIEW:	PERIOD UNDER REVIEW:

**Staff Review Form**

**Section 1: Job Responsibilities**

**Key Job Responsibilities** are described below. This list provided here should be reviewed with the staff member and the reviewer, and agreed upon at the beginning of the review. If any responsibilities are not appropriate to the individual being reviewed, they should be by-passed and other more appropriate responsibilities added. Only major responsibilities are expected to be review here.

Rate each area on a scale of 1 to 4 and provide descriptive evaluative comments. Circle or highlighting the rating that is appropriate based on this description:

- 4 = an area of real strength, consistently achieves excellence in this area, well regarded
- 3 = competent in this area, usually performs well, definitely meets expectations
- 2 = performance is uneven, sometimes below expectations, and there is some need for development
- 1 = an area needing significant improvement or attention, including outside development

	<b>RATING</b>			
<b>1. KEY RESPONSIBILITY: Establishing vision and plan for program or area of ministry.</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				
<b>2. KEY RESPONSIBILITY: Engaging others in carrying out the plan, including recruiting staff and/or volunteers.</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				
<b>3. KEY RESPONSIBILITY: Managing activities, logistics, materials, people, and budget for program or area of responsibility.</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				

<b>4. KEY RESPONSIBILITY: Continuously assessing needs of those served by program or ministry, seeking to build and strengthen that ministry.</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				
<b>5. KEY RESPONSIBILITY: Establishing and working with advisory groups or key stakeholders, as appropriate.</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				
<b>6. KEY RESPONSIBILITY: Promoting, marketing, communicating information about ministry or program.</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				
<b>7. KEY RESPONSIBILITY:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				

<b>8. KEY RESPONSIBILITY:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				
<b>9. KEY RESPONSIBILITY:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<u>Staff Comments</u>				
<u>Evaluator Comments</u>				

**Staff Review Form**

**Section 2: Core attributes**

**Core Attributes** are described below. These should be agreed upon prior to conducting the review. These attributes describe how an individual carries out her or his responsibilities and works with others in their ministry. These characteristics point to the expression of underlying faith, values, and virtues desired in this staff member. Items may be added in the open boxes to reflect the core values of the particular congregational community and/or staff person. Again, each item is both commented upon and rated.

These items are discussed and rated from 1 to 3 as follows:

**3** = Strongly and appropriately evident in most situations

**2** = Sometimes evident but may not be completely appropriate or consistent

**1** = Little in evidence, would like to see more

<p><b>1. CORE ATTRIBUTE: Spiritual Model.</b> Provides a spiritual perspective on all things. Models prayer as a daily practice. Takes time for spiritual growth and development through retreats, spiritual direction, and other avenues. Openly expresses his or her personal faith. Nurtures spiritual growth in others.</p>	<table border="1"><tr><td><b>1</b></td><td><b>2</b></td><td><b>3</b></td></tr></table>	<b>1</b>	<b>2</b>	<b>3</b>
<b>1</b>	<b>2</b>	<b>3</b>		
<p><u>Staff Comments</u></p>				
<p><u>Evaluator Comments</u></p>				
<p><b>2. CORE ATTRIBUTE: Team Builder.</b> Understands the importance of creating a sense of teamwork with those involved in area of responsibility. Builds a sense of community among co-workers, volunteers, and other groups. Seeks and welcomes newcomers. Gives credit to others when credit is due and encourages accountability.</p>	<table border="1"><tr><td><b>1</b></td><td><b>2</b></td><td><b>3</b></td></tr></table>	<b>1</b>	<b>2</b>	<b>3</b>
<b>1</b>	<b>2</b>	<b>3</b>		
<p><u>Staff Comments</u></p>				
<p><u>Evaluator Comments</u></p>				

**3. CORE ATTRIBUTE: Interpersonal Relationship Cultivator.** Builds and maintains interpersonal relationships with trust and mutual respect among staff, vestry, congregation, and larger community. Works comfortably and sensitively with a wide variety of people (age, sex, race, and socio-economic). Maintains appropriate boundaries with others. Deals with complaints, concerns, and suggestions in a timely and effective manner. Handles conflict appropriately, neither escalating nor suppressing.

1	2	3
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Staff Comments

Evaluator Comments

**4. CORE ATTRIBUTE: Communicator.** Communicates plans, information, and decisions in a timely and appropriate manner. People in the congregation generally feel well informed. Uses a variety of media for communication, including in-person talking, print media, and computer based media. Is open and non-defensive in communication style. Listens effectively and in a way that encourages others to be open. Maintains confidentiality.

1	2	3
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Staff Comments

Evaluator Comments

**5. CORE ATTRIBUTE: Continuous Learner, Self Steward.** Manages work load to ensure that necessary time off occurs regularly. Delegates to ensure that responsibilities are shared. Seeks learning and support from peers outside the congregation. Takes time for hobbies, recreation, and rest. Is engaged in at least one area of learning or development, whether formal or informal. Continues reading/learning on church related and other interests.

1	2	3
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Staff Comments

Evaluator Comments

<b>6. CORE ATTRIBUTE:</b> <div style="float: right; border: 1px solid black; padding: 2px;"> <b>1   2   3</b> </div>
<u>Staff Comments</u>  
<u>Evaluator Comments</u>  
<b>7. CORE ATTRIBUTE:</b> <div style="float: right; border: 1px solid black; padding: 2px;"> <b>1   2   3</b> </div>
<u>Staff Comments</u>  
<u>Evaluator Comments</u>  

**NOTE: This section may include other attributes important to the congregation, individual, or situation. Here are some examples:**

- Comfort with / stimulant for change
- Focus on quality / excellence
- Compassion
- Innovation/initiative
- Self-direction
- Problem solving
- Sense of urgency
- Calming / Stabilizing

**Staff Review Form**  
**Section 3: Development and Enhancement**

**In this section of the form, document agreements on any areas for development, strengthening, or continued use of a capability. Describe below summary conclusions based on other parts of the review, including specific actions to support any areas of enhancement. The support needed should be specified, including financial, training, or feedback. This section may also identify new areas of exploration that are of interest to the staff member being reviewed. It is recommended that no more than 3 areas be highlighted, and less is more likely to get the necessary attention.**

**AREAS OF STRENGTH:**

**AREAS FOR DEVELOPMENT:**

ACTIONS AND COMMITMENTS	WHO WILL DO THIS	BY WHEN

**SUMMARY of overall impact in review period.**

**REVIEWER:** \_\_\_\_\_ Date: \_\_\_\_\_  
*signature*

**STAFF MEMBER:** \_\_\_\_\_ Date: \_\_\_\_\_  
*signature*

I AGREE WITH THIS REVIEW IN GENERAL.

I DO NOT AGREE WITH THIS EVALUATION AND WOULD LIKE IT REVIEWED BY:

\_\_\_\_\_. (Please attach a description of points of disagreement.)