Are we there yet?

A Road Map for Implementing Church Strategy

By Patricia Lotich

SMART
CHURCH MANAGEMENT
not an oxymoron

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Words or phrases in blue are interactive.
Be sure to check them out as you read.

God's Plan

The Bible is very clear about the fact that God has a plan. The complexities of His plan are more than our human minds can comprehend, but don't be disillusioned. He has things under control. Sometimes I sit in awe of how great God is. With all of our disobedience operating outside of His plan, He still manages to move us toward His perfect will.

A major part of God's plan involves establishing churches that will train up His people to do the work of the ministry. With the great harvest just on the horizon, it is even more important for these churches to be prepared and equipped to handle the multitudes of people who will be flooding their gates.

"For as we have many members in one body, but all the members do not have the same function, so we, being many, are one body in Christ, and individually members of one another."
Romans 12:4-5

As these training churches are established, people will be prepared for what God has called them to do in the final days, and the church will be ready to handle the harvest. The discipleship and ministry responsibility rests on the pastors, but the administrative side of the church rests on those who have been given the responsibility to manage church resources.

*"And God has appointed these in the church: first apostles, second prophets, third teachers, after that miracles, then gifts of healings, helps, **administrations**, varieties of tongues."*
1 Corinthians 12: 28

God gives the church resources – people, time, money – and people give of their time to volunteer and tithe on their income. So managing God's resources is a huge responsibility that should not be taken lightly. This eBook has been written to help those with that responsibility.

CHAPTER 1: Mission, Vision and Values

I believe that every church has a part to play in God's plan and should take time in prayer to seek God's vision for their particular body of believers and work toward seeing that vision come to pass. The vision of each church supports God's "master" plan to influence a city or a nation. All the churches working together participate in knitting the tapestry of God's perfect plan around the world.

"Write the vision and make it plain on tablets, that he may run who reads it. For the vision is yet for an appointed time."
Habakkuk 2:2-3

Before an organization can be led, it needs to know why it exists, where it is going and the steps that are required to get there. This is why it is important to have a guiding Mission, Vision and Values statement that articulates why the church exists, where it proposes to go, and what guiding principles will help direct its decision-making. Those who have been charged with the responsibility of overseeing the ministry – typically the church board - should be involved in the development of the Mission, Vision and Values Statement.

The Vision Statement

A vision statement provides direction and a target for the church. It is a tool to help the organization fulfill what God has called it to do. It is the bullseye!

The value of a church vision statement is that it gives church leadership, employees and congregants a shared goal. Every organization needs to understand where it is going before it can develop a strategic plan and map out steps for how to get there.

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A church vision statement is typically two to three sentences that describe what the church hopes to become or achieve. Some

organizations write paragraphs describing their vision, but I believe that the shorter the statement, the more likely employees, volunteers and congregants will be able to absorb it, memorize it, and explain it to others. It is important for the entire congregation to have a good understanding of what the church is trying to accomplish so that everyone can buy into and support the vision.

Seven steps to writing a church vision, mission and values statement.

1. Gather church leadership.

Writing the church's Vision, Mission and Values statement should be an exercise that is done by the church board and some senior church members or staff. Ideally, this would be a done in a retreat setting, such as a private room in a restaurant, a hotel conference room, or someone's home. It just needs to be a place without interruptions and distractions.

2. Solicit help from an objective facilitator.

The beauty of the church is that God blesses churches with a wide variety of gifts, and a church congregation may have professionals available who are gifted at facilitation and may be interested in facilitating a Vision, Mission and Values session. If there is no one on the board or in the congregation who has this skill set, it may be worth investing in a couple of hours with a professional who can help. Regardless, the facilitator should drive the process and not the vision. An experienced facilitator will know how to do this.

> Commit your works to the Lord, and your thoughts will be established.
> Proverbs 16:3

3. Dream out loud.

A visioning session is the "writing-on-tablet" process and should be prayed through before the session begins. The goal is to articulate God's will for the church. Once the session begins, I like working with whiteboards or flipcharts because I think a visual helps spark thoughts and ideas.

Depending on the number of people in the session, have the group break down into units of 3-4 people, provide each group with a flip chart, and have them discuss and answer the following questions:

- Who are we?
- Where does God want us to go?
- What do we want this church to look like?
- Where do we want to be 1, 5, 10 years from now?
- As a group, create a newspaper headline about something the church has done/accomplished at some future point. This helps the group visualize the future.

4. Combine ideas, and at the end of this session:

- Have all the units come back together and tell the group the thoughts and ideas they came up with.
- Use the entire group to pick the best and most consistent thoughts and ideas from each of the smaller groups and simply write the common words on a flipchart.
- Go around the room and allow all the participants to begin to add/subtract and formalize the sentence structure of the statement. Have a laptop available to use a thesaurus, dictionary and encyclopedia/search engine as references.

5. Test the statement.

Once a couple of sentences have been written, read them out loud to the group again and determine if the entire group agrees that the statement reflects a common direction and describes a picture of an ideal future state of the church. Following are some example vision statements:

Caterpillar: Be the global leader in customer value.

DuPont: The vision of DuPont is to be the world's most dynamic science company, creating sustainable solutions essential to a better, safer and healthier life for people everywhere.

Heinz: Our Vision, quite simply is to be the world's premier food company, offering nutritious, superior tasting foods to people everywhere.

Sears: To be the preferred and most trusted resource for the products and services that enhance home and family life.

Avon: To be the company that best understands and satisfies the product, service and self-fulfillment needs of women globally.

The Mission Statement

Once the vision statement is written, do a similar exercise to come up with a mission statement. Remember a mission statement is a short description of "why" the organization exists. Vision and mission statements are the cornerstone for decision making. I used to work for a pediatric hospital, and the mission was "We will do what is right for kids." It is simply stated, but it is very powerful in the boardroom. When challenged with difficult questions, senior leadership would ask: "Is this decision in the best interest of the kids we serve?" This tool helps keep the organization focused on its priorities. A great book that can help teach your group how to simplify a message is Made to Stick, by Chip and Dan Heath.

Vision and mission statements are the cornerstone for decision making.

- While in the same units, spend 20-30 minutes writing down descriptive words for why the church exists.
- After all the units have written their ideas on the flip chart, have each unit present its ideas to the whole group.
- Using one flip chart, combine ideas and begin "wordsmithing" the ideas until the group creates a short phrase that reflects all ideas.
- Have all the units read the final statements and come to an agreement that the phrase truly reflects the mission of the church and why it exists.

The Values Statement

Once there is a vision and mission statement, break the group into units again and allow them 20 minutes or so to list values (value = a principle, standard, or quality considered worthwhile or desirable) of the organization. Remember, these will become shared values or principles that the organization operates by.

- Once each unit has its list, have them present it to the entire group. Combine ideas and refine them into one list. There are usually a lot of ideas that overlap (which is a good thing).
- Ideally, a list of values should be 5-10 words. The goal is for people who align themselves with the organization to be able to simply memorize the Vision, Mission and Values. The more concise the better.

That wasn't so difficult, was it? Many churches and nonprofit organizations fail to come up with a Vision, Mission and Values statement because the process scares them, but with the right people in the room, it can be done in a few hours. Once a Vision, Mission and Values statement is written, the strategic planning process can begin!

CHAPTER 2: Strategic Planning

Once the vision is articulated, the next step is to develop a strategic plan. A strategic plan articulates the mission and vision and creates a road map for getting there. The written plan describes where the church is today and how it will fulfill God's vision for the church. Strategic planning can be tedious. It takes a lot of time, thought and prayer. The process typically takes weeks or even months depending on how much time can be devoted to it on a day-to-day basis. Strategic planning should be done at the Board level with senior leadership involved.

The strategic planning process identifies **what** needs to be done (vision and strategic plan), **how** it gets done (organizational and departmental goals) and **who** will do it (employee and volunteer job descriptions). This structured process helps to ensure the vision is implemented throughout the entire organization.

Developing the Plan

Strategic plans help to map out the steps, process, and timeline to get from the present state of the organization to the desired future state. In order to do this, there are two different levels of planning required: short-term (3-6 months) and long-term (12-36 months). It used to be that strategic plans were written for anywhere from five to even ten years out, but as quickly as things change nowadays, a three-year plan is probably as aggressive as you can get without needing to modify the plan along the way.

> Strategic plans help to map out the steps, process, and timeline to get from the present state of the organization to the desired future state.

Strategic Planning Process

The first step identifies the outcome—where do you want to be in three years? Take some time to brainstorm or visualize what that future state looks like. For example, strategic objectives or outcomes may be things like building a Bible school, planting

churches, sending missionaries to certain parts of the world, or developing worship leaders—anything that supports the church vision.

Next, create a timeline for completion of your objectives and determine how many weeks, months or years it will realistically take to complete the objectives. This is done by thinking through the high-level action steps needed to complete the tasks involved.

Example:

Long-Term Three-Year Strategic Plan			
Strategic Objectives	**Year 1**	**Year 2**	**Year 3**
Reduce operating budget by 5%, from $1M to $950,000 by end of year 1.			
Grow volunteer base by 20%, from 250 to 350 by end of year 2.			
Grow church from 1200 to 1500 congregants by end of year 3.			
Plant church 50 miles from current church location by end of year 3.			

Once you've identified "where" you want to be (this should line up with the vision God has given your ministry), the next step is to start mapping out what it will take to get there. For example, to plant a church, what are the steps that need to be taken – i.e., identify church plant leader, identify new church location, decide on church model, transition plan for leader, timeline to new church opening, etc. This detailed planning can be put in the format of an action plan.

An action plan is merely a written document outlining the objectives (goals), action steps, responsible person(s), possible team members, due date for each action step and implementation status. Mapping this out creates a visual that is easy to see at a glance for what needs to be done and by when.

Example:

Strategic Objective	Action Steps	Responsible Person(s)	Due Date	Status
Plant church 50 miles from current church location.	Identify church plant leader.	Church Board	June 15, 20XX Year 1	
	Identify new church location.	Church Board	December 31, 20XX Year 2	
	Decide on church model.	Church Board	September 30, 20XX Year 2	
	Create transition plan for new church leader.	Church Board/ Senior leaders	June 30, 20XX Year 2	
	Timeline for new church opening.	Senior Leadership	December 31, 20XX Year 1	
	Open new church.	Senior Leadership	September, 20XX Year 3	

As you create the action plan, you will identify objectives or steps that individual church departments need to take to support strategic objectives. As each department identifies its goals and objectives, it provides the information needed to write individual (or volunteer) job descriptions which support departmental goals, which support organizational goals and ultimately the strategic plan.

This graphic shows how goals and accountability flow throughout the organization.

Vision Implementation Process

VISION

STRATEGIC PLAN

ORGANIZATIONAL GOALS

DEPARTMENTAL GOALS

EMPLOYEE GOALS

JOB DESCRIPTION

PERFORMANCE APPRAISAL

Organizational Goals

As the organization works toward accomplishing the strategic plan, there needs to be a structured process to take the organization from where it is to where it wants to be. This can be done by developing annual organizational goals. Annual goals are written to break long-term goals into bite-sized pieces. This provides the framework for accomplishing them in steps and stages rather than all at once, and it serves as a tool for performance monitoring. This is done by taking the goals down to the departmental and staff level and ensures that what staff members are doing day-to-day lines up with the vision and goals of the organization. It is easy for employees to get off track day-to-day, but this process will keep them focused on the organization's priorities.

Goals are important because they provide direction, clarify job roles, give employees something to strive for, and help make the vision attainable.

Goals are important because they provide direction, clarify job roles, give employees something to strive for, and help make the vision attainable. Writing down your goals makes them more real and achievable because it allows you to see where you are going and which steps you must take to get there.

The structured process should include a cycle that begins with writing goals, communicating expectations, monitoring performance toward goals, assessing performance and ends with the performance appraisal. This cycle is repeated on an annual basis.

Once the organization has some direction for the next twelve months, the organizational priorities can be delegated to individual departments. This step ensures that there is a person or a group of people with responsibility for goal completion.

Example:

Year 1 Church Annual Goals
- Increase weekly attendance by 10% (120 people based on 1200 member church).
  - *This supports the strategic objective of growing the church to 1500 people in three years.*
- Increase the number of church volunteers by 20% (50 new volunteers based on 250 current volunteers).
  - *This supports the strategic objective of growing the volunteer base by 20%, from 250 – 350 volunteers.*
- Decrease operating costs by 5%
  - *This supports the strategic objective of reducing operating costs by 5%.*

Now take these annual goals and apply them at the department level. This requires assigning the goal to a specific department. For example, the church goal of increasing weekly attendance by 10% can be delegated to several different departments, but one specific department might be Adult Education.

Example:

A departmental goal might look like this.

Department: Adult Education
Department Pastor: Joe Smith
Goal: Increase church attendance by 10% by December 31, 20XX

Objective (goal)	Action Steps	Responsible Person	Team Members	Measured by:	Due Date	Status
Develop Discipleship Programs*	Identify teaching topics.	Pastor Joe Smith	Susan Jones	Completion by due date	March 1	
	Research curriculum.	Susan Jones	Susan Jones	Completion by due date	April 15	
	Identify teachers.	Pastor Joe Smith	Susan Jones	Completion by due date	April 30	
	Schedule classes.	Susan Jones	Susan Jones	Completion by due date	May 15	

*This goal supports the organizational goal of increasing attendance by 10%. It also supports the strategic goal of increasing church attendance to 1500 congregants. Developing discipleship programs was identified by congregant feedback and the hope is that, if the programs are done well, congregants will want to bring people to church for the experience.

To ensure that the departmental goals are accomplished, they need to be delegated to individual employees or volunteers. This is done by mapping the goals and steps the employee needs to take in order to accomplish the goals. As you will note, these goals line up with individual departmental goals. This tool is very valuable during the annual performance appraisal process because it will determine if the organization's goals, which were set at the beginning of the year, were actually accomplished by the end of the year.

Now we will take the previous departmental goal and break it down into steps for an employee or volunteer to accomplish.

Example:

Department: Adult Education Employee: Susan Jones 20XX Annual Goals						
Objective (goal)	**Action Steps**	**Responsible Person**	**Team Members**	**Measured by:**	**Due Date**	**Status**
1. Research Discipleship curriculum	1. Benchmark other like churches 2. Internet Research 3. Question pastors and congregation 4. Review ideas with Pastor Smith 5. Order curriculum for class	Susan Jones	Pastor Joe Smith	Accomplished by due date	April 15	In process
2. Schedule Classes	1. Identify available classrooms 2. Schedule Classrooms 3. Advertise Classes in bulletin, website, etc. 4. Register attendees 5. Solicit post-class evaluations 6. Summarize evaluations for Pastor Smith 7. Enter attendees in adult education database	Susan Jones	Pastor Joe Smith	Accomplished by due date	April 30	In process

As you will notice, the objective (goal) for Susan is taken from the action steps in the departmental goal. This allows Pastor Joe Smith to assign responsibility to Susan Jones for accomplishing this goal. This document will be used when Susan is reviewed at her annual performance appraisal, which will demonstrate her goal completion. When Susan completes her goal, it allows Pastor Joe Smith to accomplish his goal which supports the global church goals.

Job Descriptions

Job descriptions should be written to reflect individual goals which support the departmental goals. Job descriptions should describe reporting relationships (this is to identify who the boss is). They should also list day-to-day job duty accountabilities that this person is responsible for doing. Job descriptions should be reviewed and updated annually (the performance appraisal is a good time to do this).

Example:

Church Staff Job Duties and Description
Main Street Community Church
Administrative Assistant
Job Description and Duties

Position Purpose: To ensure administrative support for Executive
                      Pastor.

Reports to: Executive Pastor

Salary Range: $XX,000 - $XX,000

Job Duties:
  • Keeps weekly appointment calendar for Executive Pastor.
  • Makes all travel arrangements including air, hotel, car and
    expense reporting process.
  • Takes minutes at weekly staff meeting and monthly church
    council meetings.
  • Schedules and organizes all adult discipleship classes. This
    includes advertising, class handouts and feedback evaluations.
  • Tracks adult class attendance and enters information into church
    database.

Click here to see full Job Description.

As you can see, in the highlighted line above, the responsibility of organizing adult discipleship classes is part of the administrative assistant's job duties description. This provides a direct link between staff members' job duties, their department goals, and, ultimately, the global goals which support the strategic plan.

CHAPTER 3: Performance Management

All church staff should be held accountable for their job duties. Accountability means, "subject to giving an account; answerable." Goals are only as effective as the person who has responsibility for completing them. When church staffs are not held accountable for achieving objectives, strategic plan implementation can be hindered.

In order for staff to be held accountable for what they are responsible to do, there needs to be a structured performance management process. Performance management is merely communicating expectations and managing the performance of employees. Unfortunately, not all employees have the self motivation to get things done with accuracy and in a timely manner. Anyone who has ever managed people knows that some employees are self starters while others need to be managed.

So what are the tricks to managing staff performance?

Setting Clear Performance Expectations

One of the biggest mistakes managers make is not communicating clear expectations to employees. I've counseled countless managers who voice frustrations when employees don't perform to the desired level. My first question is: How did you communicate expectations to the employee? More times than not the manager admits an informal communication process that does not include a lot of detail.

> One of the biggest mistakes managers make is not communicating clear expectations to employees.

Communicating Clear Expectations

The manager is responsible for articulating expectations in a goal document and allowing the employee to ask clarifying questions. This should be an open two-way conversation that makes the expectations clear.

As the illustration below suggests, the more time a manager spends with an employee on the front end (orientation to job and clarification of expectations), the less time needs to be spent with the employee on the back end. Clear communication that allows for clarification and questions minimizes issues later in the process.

Time communicating employee expectations

Initial time spent with employee →

Overall time spent with employee ⟶
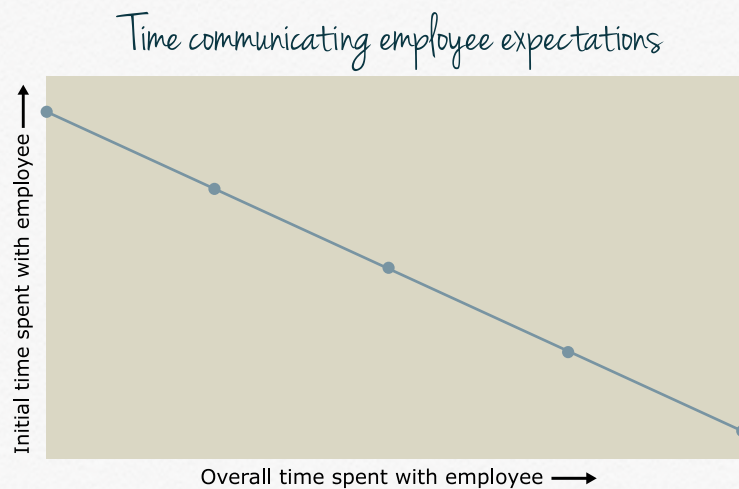
Monitoring Progress Toward Goals

Once expectations have been shared with the employee, the manager should follow up occasionally and ask the employee how things are going, finding out if there are any questions and if there are any barriers to completing goals. Often, internal systems, processes, and sometimes people hinder an employee's ability to achieve goals. The manager needs to be aware of this so he or she can help remove anything that might be interfering with completing the goal.

Often, internal systems, processes, and sometimes people hinder an employee's ability to achieve goals.

Documenting Conversations

So many things compete for a manager's attention, and that sometimes makes it difficult to remember conversations with

employees. Creating a structured note-taking process helps ensure there is a history of important staff conversations.

Note-taking is a simple way to document employee performance conversations. There doesn't need to be paragraphs of information, just enough to tickle your memory enough to have a conversation about it. Creating a system that works for you is the best approach. Here is an example of a model I've used.

If you use a planning calendar, you can keep a separate page for each employee in the back. On those pages simply jot down any significant incident or conversation that occurs with that employee. Make the following columns and fill them in after an employee conversation.

- Employee name
- Incident date
- Incident time
- Incident description
- Person(s) involved
- Action taken

Example:

Note Taking Log:

Name	Date	Time	Incident Description	Persons Involved	Action Taken
Maggie Jones	January 3	11:00 am	Maggie did a great job by proactively preparing for the staff presentation.	Maggie Jones	Stopped by Maggie's desk and thanked her for taking care of the presentation.
	February 9	9:00 am	Maggie arrived 45 minutes late for work.	Maggie	Stopped by Maggie's desk and reminded her of tardy policy.
	April 6	1:00 pm	Noticed that the quarterly board report had three typos.	Maggie	Pointed out typos and coached Maggie on proofing techniques.
	June 12	6:00 pm	Maggie stayed late without being asked to finish report for John.	Maggie	Thanked Maggie for going above and beyond to finish the report.

This example log shows how a manager can document employee conversations about both positive and negative behaviors. This demonstrates that the employee is receiving continual feedback that helps the employee better understand his or her behavior boundaries and it reinforces positive behaviors.

This log will also be very helpful when the manager prepares the employee performance appraisal form. All the information on this log will help create an objective performance appraisal for the prior 12 months and it will allow for an honest, objective, factual and unbiased conversation with the employee. This kind of structured annual process works to celebrate employee successes and helps to correct behaviors that may have veered off course.

This approach to note-taking may seem like extra work, but it is well worth the time investment to have lots of data and be prepared for the annual evaluations. Developing employees is one of the most rewarding aspects of managing people, and it is a big responsibility that should not be taken lightly.

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The Performance Management Cycle

Creating a structured, predictable cycle for managing performance helps to get things done and supports completion of annual goals.

Performance Management Cycle
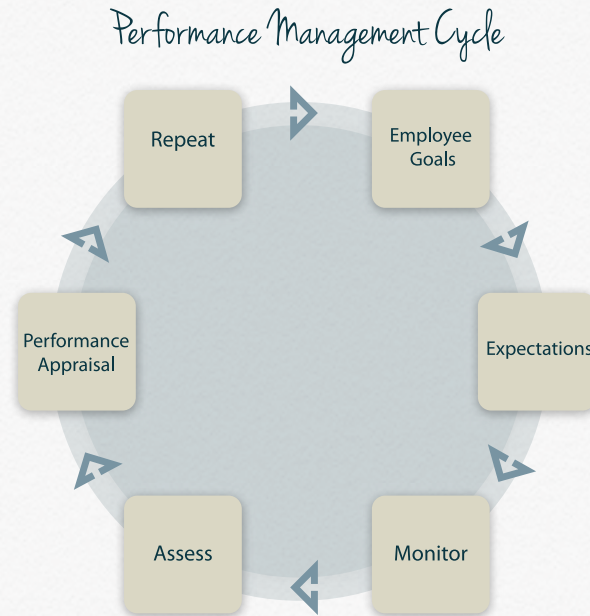
Expectations

It is important that goals are explained and employees understand what is expected of them. The best way to do this is to have the employee involved in the goal development process. Without employee involvement, buy-in to the goal can be a challenge. Allowing employees to be part of the process gives them the opportunity to voice any concerns about completing the goals. Once the goals are finalized and agreed upon by both employee and manager, the expectations should be laid out very clearly. The manager needs to be sure the expectations are very clear and the employee understands what is expected, when it is expected, and what actions will be taken if the employee misses the

> The manager needs to be sure the expectations are very clear and the employee understands what is expected.

agreed-upon deadlines.

Asking the employee to verbalize the agreed-upon expectations is a tactic that can ensure clarity. This will ensure that details don't get lost in the translation.

Monitoring Goals

The next step in the performance management cycle is to monitor the progress toward goals. A manager should meet with employees on a regular basis (depending on the level of the employee) and talk through progress toward the goals. This constant interaction will give the employee the opportunity to raise concerns about meeting goals, and it allows the manager to help the employee think through resolution to any problem that may be hindering them.

The manager should monitor the employee progress toward goals by assessing the progress of the timeline and providing feedback. This feedback should be constructive in nature, allowing the employee to make adjustments as needed. Doing an assessment on a regular basis (several times a year) eliminates the last-minute gathering of information at performance appraisal time.

Why Do Performance Appraisals?

Churches use the performance appraisal process to help manage employee performance and achievement of ministry goals. It is important to have well trained church managers and a structured process to document church employee performance and give performance appraisals. A well done performance appraisal process can be a positive experience for the employee and help the employee see how he or she contributes to organizational goals. If not done well, the performance appraisal can be a very stressful time and one of the most difficult conversations of the year.

The performance appraisal process should be a time to reflect on the last year and celebrate successes. It should also

be used as a time to course correct if an employee has gotten off track. Reinforcing the positive and celebrating the successes can influence future positive behaviors.

Statistics show that an estimated 40% of workers never receive performance evaluations. And for the 60% of the workers who do, most are poorly done. Wow, what a scary thing! The fact is that employees want and need to know if they're doing a good job. A formal performance appraisal process forces managers to communicate both good and bad performance results to the employees.

> 40% of workers never receive performance evaluations.
>
> And for the 60% of the workers who do, most are poorly done.

Goals don't just happen—they need structured systems and processes, and the performance appraisal process is an important part of the cycle.

Example Church Staff Performance Appraisal

The first step in creating an employee performance appraisal form is identifying those things (dimension measures) that the employee will be assessed on. This is done by looking at the values statement and guiding principles as well as those employee characteristics that are important to successful performance. For example, a church value may be teamwork or customer service and it may be identified that successful performance is measured by an employee's ability to work with others, communicate well, or possess certain job skills.

An example of common dimension measures of performance are: Teamwork, communication, attendance, job knowledge and completion of goals. These dimensions should be church-specific and identified globally as part of the strategic planning process.

Each of the measures should have a description that is clear and understandable for the employee. For example: **Teamwork:** Employee values team interactions and works

effectively with others. Is a team player and helps encourage and orient new team members. Employee is able to balance personal effort and project team effort.

Communication: Employee communicates professionally with others and shares thoughts and ideas appropriately. Listens to others, asks clarifying questions, and controls emotions under pressure.

Customer Focus: Employee understands who his/her customers are and proactively responds to customer needs and adheres to ministry service standards.

Attendance and punctuality: Employee shows up for work at assigned time and provides ample notice when unable to come to work. Uses designated time off forms to request time away from job.

Job knowledge: Employee understands every aspect of job tasks and responsibilities and proactively updates job skills. Employee offers assistance to help others improve skills.

Goal completion: Employee completed annual goals as assigned.

Okay, now let's come up with a scale to measure these dimensions. There are different schools of thought on scaling. Some prefer a five-point scale, but others use a ten-point scale because it is a slightly tighter measure.

The way you word the description of the measurement dimension is determined by the rating scale.

Common scales are:
- Strongly Disagree – Agree - Strongly Agree
- Never – Sometimes – Always
- Of no importance at all – Moderately Important – Extremely Important
- Dissatisfied – Satisfied – Extremely Satisfied
  Ok, now let's create these dimensions on a measurement

scale in an example performance appraisal form. This form incorporates both the employee self assessment as well as the manager's assessment of the employee.

ABC Community Church
20XX Performance Appraisal

Employee Name:

Department:

Please check the box that best describes frequency of performance measure.

Customer Focus: Employee understands who their customers are and proactively responds to customer needs. Employee adheres to ministry service standards with every customer contact.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Teamwork: Employee values team interactions and works effectively with others. Is a team player and helps encourage and orient new team members. Is able to balance personal effort with project team effort.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Job knowledge: Employee understands every aspect of job tasks and responsibilities and proactively updates job skills. Offers assistance to help others improve job skills.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Communication: Employee communicates professionally with others, in print and shares thoughts and ideas appropriately. Listens to others and asks questions of clarity. Controls emotions under pressure.

	Never 1	2	Sometimes 3	4	Always 5
Employee S...					

Click here to see the full form.

Performance Appraisal Delivery

Since we are all human, it is common for us to make "errors" when assessing employee performance. These errors are reflective of our unconscious biases toward the employee and can give an employee an advantage or disadvantage over others in their peer group.

> It is common for us to make "errors" when assessing employee performance.

Rater Errors as described in Human Resource Strategy, by Dreher/Dougherty are reflective of our imperfect judgment of others. It is for this reason that it is important to understand these biases and take them into consideration when preparing a performance appraisal document.

According to Dreher/Dougherty, "A barrier to the accuracy and credibility of performance measures is posed by a number of rater errors, perceptual biases and other sources of distortion in performance ratings." There are six common rater errors that managers make when assessing performance. Understanding what these errors are can help keep managers from falling victim to them.

So what are the six rater errors?

1. Halo Effect
The Halo Effect happens when a rater's overall positive or negative impression of an individual employee leads to rating him or her the same across all rating dimensions. This happens when a manager really likes or dislikes an employee and allows personal feelings about this employee to influence performance ratings.

2. Leniency Error
Leniency error refers to a rater's tendency to rate all employees at the positive end of the scale (positive leniency) or at the low end of the scale (negative leniency). This can happen when a manager

over-emphasizes either positive or negative behaviors.

3. Central Tendency Error

Central tendency error refers to the rater's tendency to avoid making extreme judgments of employee performance, resulting in rating all employees in the middle part of a scale. This can happen either when a manager is not comfortable with conflict and avoids low marks to avoid dealing with behavioral issues or when a manager intentionally forces all employees to the middle of the scale.

4. Recency Error

Recency error is the rater's tendency to allow more recent incidents (either effective or ineffective) of employee behavior to carry too much weight in evaluation of performance over an entire rating period. This can be extreme on both ends of the spectrum. Either an employee is just finishing a major project successfully or an employee may have had a negative incident right before the performance appraisal process and it is on the forefront of the manager's thoughts about that employee. It is for this reason that it is important to keep accurate records of performance throughout the year to refer back to during performance appraisal time.

5. First Impression Error

First impression error is the rater's tendency to let his/her first impression of an employee's performance carry too much weight in evaluation of performance over an entire rating period. An example of this would be a new employee joining the organization and performing at high levels during the honeymoon period and then losing some of that initial momentum as time goes on.
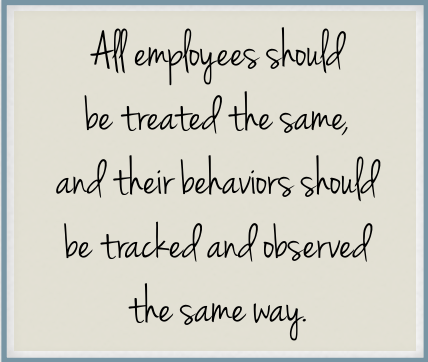
6. Similar-to-me Error

Similar-to-me error means that the rater's tendency is biased in performance evaluation toward those employees seen as similar to the raters themselves. We can all relate to people who are like us, but we cannot let our ability to relate to someone influence our rating of their employee performance.

The Performance Appraisal Conversation

Preparation for the performance appraisal is ongoing. A manager should always be thinking about the process, and whenever a problem is noticed with an employee's performance, mention it to the employee and make a note of it. At the same time, whenever an employee demonstrates a desired behavior or result, mention it to the employee and make a note of it.

Performance appraisals need to be: Fair, Pertinent and Comprehensive. All employees should be treated the same, and their behaviors should be tracked and observed the same way. Terminology of observations and documented behaviors should be the same so there are no biases in the process.

> All employees should be treated the same, and their behaviors should be tracked and observed the same way.

Questions to ask yourself when completing the PA form:

- Would I have made the same note on a different employee?

- Are my observations the same or am I over-emphasizing a single event?

- Am I giving immediate feedback after a problem is observed so the employee has a chance to change his/her behaviors and improve?
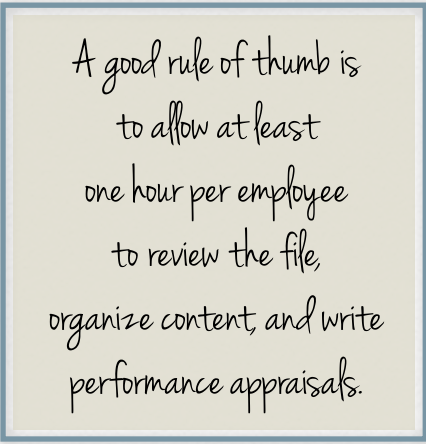
The appraisal should be pertinent to how the job is performed and relevant to job expectations and standards of work that have been established. It should be comprehensive in monitoring and observing behaviors that tell a story about the employee throughout the entire performance period. All unusual events that affect performance should be documented and filed. It is also important to make note of positive performance and major

accomplishments in order to be fair and balanced. The positive notes are important for celebration of successes at the performance appraisal time. Documentation helps you to remember the details of the observation. Use a third party occasionally to review your observations to help keep you focused and objective.

Performance Appraisal Preparation

When it's time to do the performance appraisal, determine what information should and should not be included in the final appraisal. Look for information that shows patterns in behavior. This is not a time to surprise the employee, which is why each time you make a note for the file the employee should be made aware of it.

It is important to block out time on your calendar to write the performance appraisal. A good rule of thumb is to allow at least one hour per employee to review the file, organize content, and write performance appraisals. Take time to write and do an initial draft of the appraisal ahead of the deadline. Sleep on it, and look at the draft again, and test it to make sure it is a comprehensive assessment that is pertinent and fair.

> A good rule of thumb is to allow at least one hour per employee to review the file, organize content, and write performance appraisals.

Take time and discuss the employee's performance with the second level supervisor. This will help to assure that you have no biases in your evaluation. Schedule the performance appraisal at an appropriate time and a neutral location. Try to use a conference room, as a manager's office can be intimidating to an employee.

When delivering the performance appraisal, be sure that you will be free of interruptions. Be prepared with specific examples of effective and ineffective performance and be ready to answer questions if asked.

Performance Appraisal Discussion

When you begin the discussion, be sure to state the purpose of the appraisal and the process you will be using for the discussion. Review the appraisal with the employee while probing for additional information, misunderstandings or views that differ from yours. Once the discussion is finished, summarize the performance discussion and have the employee sign the appraisal for the files.

Managers must be willing to commit significant amounts of time to performance management. A lack of clear performance expectation and detailed performance feedback is a major source of stress for employees. It is important to make sure the employee's job description reflects what is written in his/her goals.

Finally, try to remember that most employees want to do a good job and it is the manager's responsibility to help them identify their boundaries and goals and to provide them with the necessary resources to accomplish them.

Parting Words

We've looked at a global view of a ministry and the steps necessary to implementing its vision. It starts at the top and is filtered throughout the entire organization. This kind of structured process creates the infrastructure to ensure development and completion of goals and, ultimately, strategy.

These business concepts can help leaders fulfill their church's mission and vision and provide a necessary resource to manage church employee performance.

I hope this eBook has provided some helpful tools and resources for you as you endeavor to pursue God's perfect will for your ministry.

If we can offer support at Smart Church Management we would love to help you think through strategy, develop action steps and walk through implementation. We would also value your feedback on this eBook. Please comment by clicking here.

Thanks for visiting.

Patricia Lotich
President and CEO
Smart Church Management

Church Staff Job Duties and Description
Main Street Community Church
Administrative Assistant
Job Description and Duties

Position Purpose: To ensure administrative support for Executive
Pastor.

Reports to: Executive Pastor

Salary Range: $XX,000 - $XX,000

Job Duties:
- Keeps weekly appointment calendar for Executive Pastor.
- Makes all travel arrangements including air, hotel, car and expense reporting process.
- Takes minutes at weekly staff meeting and monthly church council meetings.
- Schedules and organizes all adult discipleship classes. This includes advertising, class handouts and feedback evaluations.
- Tracks adult class attendance and enters information into church database.
- Supports Executive Pastor at weekly church services by being available to help with service related issues.
- Schedules monthly staff meetings and helps create agenda, talking points and special activities.
- Acts as liaison between church staff and Executive Pastor. Troubleshoots issues and keeps Executive Pastor informed of unresolved issues.
- Manages department budget by reporting expenses and tracking monthly variances. Keeps Executive Pastor aware of budget variances greater than $500.
- Administrative assistant takes an active role in indentifying church improvement opportunities and leading staff team process improvement efforts.
- Other duties as assigned by Executive Pastor.

Performance Appraisal

Employee Name:

Department: _____

Please check the box that best describes frequency of performance measure.

Customer Focus: Employee understands who their customers are and proactively responds to customer needs. Employee adheres to ministry service standards with every customer contact.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Teamwork: Employee values team interactions and works effectively with others. Is a team player and helps encourage and orient new team members. Is able to balance personal effort with project team effort.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Job knowledge: Employee understands every aspect of job tasks and responsibilities and proactively updates job skills. Offers assistance to help others improve job skills.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Communication: Employee communicates professionally with others, in print and shares thoughts and ideas appropriately. Listens to others and asks questions of clarity. Controls emotions under pressure.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

SMART
CHURCH MANAGEMENT

Attendance and punctuality: Employee shows up for work at assigned time and provides ample notice when unable to come to work. Uses designated time off forms to request time away from work.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Completion of goals (refer to goal document):

	Not Started 1	2	In Process 3	4	Completed 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Overall Performance

	Needs Immediate Improvement 1	2	Meets Requirements 3	4	Exceeds Expectations 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

List any employee accomplishments for the year that were not part of predetermined goals.

Employee Comments	
Manager Comments	

Employee Development Plan (including any continuing education needs).

Employee Signature: _____ Date: _____

Manager Signature: _____ Date: _____