

**APPENDIX O**

**ANNUAL PERFORMANCE REVIEW  
WITH OBJECTIVES SETTING FOR THE SUBSEQUENT YEAR  
FOR PASTORAL AND PROFESSIONAL EMPLOYEES**

**EMPLOYEE NAME** \_\_\_\_\_

**POSITION TITLE** \_\_\_\_\_

**REVIEW OF PERFORMANCE FOR YEAR** \_\_\_\_\_

**OBJECTIVES SETTING FOR YEAR** \_\_\_\_\_

**DATE OF PERFORMANCE REVIEW MEETING** \_\_\_\_\_

**PART 1: PERFORMANCE REVIEW**

**Instructions:**

1. The employee will list her/her objectives from the past year, noting both accomplishments and objectives missed.
2. This draft will be provided to the supervisor, who will review it, add comments, and set a performance review meeting.
3. The supervisor will schedule and conduct the review with the employee, with participation by a member of the Personnel Committee only when requested by the supervisor. Council chairs will provide prior input via a standardized form. The employee and the supervisor will together review the document. The supervisor will review employee comments regarding accomplishments and the objectives missed and review the employee's progress toward the prior year's objectives as well as assess performance attributes and annual performance. The assessment options are as follows:

Exceeds requirements (E)  
Meets requirements (M)  
Needs improvement (N)  
Unacceptable (U)

4. The supervisor will coach for improved performance as necessary, which guidance will be noted in the review and reflected in objectives set for the next year. All meeting participants will sign off on the performance review for the year.

**PROGRESS TOWARD PRIOR YEAR'S OBJECTIVES**

**OBJECTIVE 1:**

**Employee Comments:**

**Supervisor Comments:**

**OBJECTIVE 2:**

**Employee Comments:**

**Supervisor Comments:**

**OBJECTIVE 3:**

**Employee Comments:**

**Supervisor Comments:**

**EMPLOYEE SELF-ASSESSMENT OF PROGRESS TOWARD PRIOR YEAR'S OBJECTIVES:**

**REVIEW OF PERFORMANCE ATTRIBUTES**

(This section is to be completed by the supervisor only.)

Position knowledge and focus Assessment: \_\_\_\_\_

Position competence Assessment: \_\_\_\_\_

Leadership skills Assessment: \_\_\_\_\_

Interpersonal skills Assessment: \_\_\_\_\_

Communication skills Assessment: \_\_\_\_\_

Initiative and resourcefulness Assessment: \_\_\_\_\_

Flexibility and teamwork Assessment: \_\_\_\_\_

Dependability Assessment: \_\_\_\_\_

The qualities of loyalty, discipline, dedication,  
integrity, honesty, and commitment to  
Southminster Presbyterian Church Assessment: \_\_\_\_\_

**ANNUAL PERFORMANCE REVIEW** Assessment: \_\_\_\_\_  
**(PROGRESS TOWARD PRIOR YEAR'S OBJECTIVES**  
**AND REVIEW OF PERFORMANCE ATTRIBUTES)**  
(To be entered by supervisor.)

**Optional questions for the employee, for discussion at the performance review meeting:**

1. What do you believe are your three greatest contributions this year?
2. What are your disappointments or frustrations of this year?
3. In what ways could the Southminster pastoral and professional staff be a more effective team?
4. In what ways could your supervisor or the Pastor/Head of Staff be more helpful or supportive in making your ministry more effective?
5. Other comments?

**PART 2: OBJECTIVES SETTING**

**Instructions:**

1. The employee will draft objectives for the coming year, considering the position description and the mission of Southminster Presbyterian Church. Three objectives are to be identified. NOTE: Since *Responsibilities* in the position description are, in general, prioritized, most objectives will come from the responsibilities at the top of the list. Wherever possible, objectives are to be SMART (specific, measurable, actionable, realistic, and time-bound). Developmental objectives may also be included (e.g., attending workshops,

learning new skills or software, and reading specific books.)

2. This draft will be provided to the supervisor, who will set a meeting to finalize the objectives.
3. The employee and the supervisor together will establish and sign off on the objectives for the year. These objectives (the "what"), together with performance attributes (the "how," listed above), will guide performance for the coming year; and results against objectives will be the primary basis for annual wage and salary increases.

### **OBJECTIVES FOR THE COMING YEAR**

#### **OBJECTIVE 1:**

**Employee Comments:**

**Supervisor Comments:**

#### **OBJECTIVE 2:**

**Employee Comments:**

**Supervisor Comments:**

#### **OBJECTIVE 3:**

**Employee Comments:**

**Supervisor Comments:**

Supervisor signature \_\_\_\_\_ Date \_\_\_\_\_

Employee signature \_\_\_\_\_ Date \_\_\_\_\_

Personnel Committee Member signature \_\_\_\_\_ Date \_\_\_\_\_  
(if in attendance)

Pastor/Head of Staff signature \_\_\_\_\_ Date \_\_\_\_\_

**Distribution:** Copies of this completed document will be given to the employee, the supervisor, and the Chair of the Personnel Committee. The original will be retained in the employee's personnel file.