

## APPENDIX O

### ANNUAL OBJECTIVES AND PERFORMANCE REVIEW FOR PASTORAL AND PROFESSIONAL EMPLOYEES

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

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

OBJECTIVES FOR YEAR \_\_\_\_\_ DATE OF OBJECTIVES SETTING \_\_\_\_\_

DATE OF PERFORMANCE REVIEW \_\_\_\_\_

#### INSTRUCTIONS:

##### Objectives Setting

1. The employee will draft objectives for the year, considering the position description and the mission of Southminster Presbyterian Church. Three to five positional 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 below), will guide performance for the year; and results against objectives will be the primary basis for annual wage and salary increases.
4. 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 file.

##### Performance Review

1. In mid-July, a member of the Personnel Committee will contact the employee to assure that he/she has this copy of his/her objectives (the process above) and will request that the performance results against positional and developmental objectives be drafted, noting both accomplishments and objectives missed.
2. By August 1, the employee will give the draft to the supervisor.
3. The supervisor will review it and add comments and ratings.
4. During the second week of August, a member of the Personnel Committee will

confirm that process points 2 and 3 immediately above have been completed or will be completed by the time of the performance review meeting, which the Personnel Committee member will set, to be held during the third or fourth weeks of August. In addition to the employee and the supervisor, a representative from the appropriate Council(s) and a member of the Personnel Committee also will participate in this meeting.

5. At the performance review meeting, the employee and the supervisor will together review the document. A representative from the appropriate Council and a member of the Personnel Committee also will participate in this meeting. The supervisor will review comments re: the accomplishments and the objectives missed and the performance attributes, as well as performance assessment. The assessment options\* are as follows:

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

6. The supervisor will coach for improved performance as necessary, which guidance will be included in the *Annual Objectives and Performance Review* as well as a positional objective or a developmental objective for the next year. All meeting participants will sign off on the performance review for the year.
7. 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.

---

## **PROGRESS TOWARD MINISTRY OBJECTIVES**

### **OBJECTIVE 1:**

**Employee Comments:**

**Supervisor Comments:**

### **OBJECTIVE 2:**

**Employee Comments:**

**Supervisor Comments:**

**OBJECTIVE 3:**

**Employee Comments:**

**Supervisor Comments:**

**OBJECTIVE 4:**

**Employee Comments:**

**Supervisor Comments:**

**OBJECTIVE 5:**

**Employee Comments:**

**Supervisor Comments:**

**EMPLOYEE OVERALL SELF-ASSESSMENT\* AND COMMENTS:**

**SUPERVISOR OVERALL ASSESSMENT\* AND COMMENTS:**

**PROGRESS TOWARD PERSONAL GROWTH OBJECTIVES**

**OBJECTIVE 1:**

**Employee Comments:**

**Supervisor Comments:**

**OBJECTIVE 2:**

**Employee Comments:**

**Supervisor Comments:**

**EMPLOYEE OVERALL SELF-ASSESSMENT\* AND COMMENTS:**

**SUPERVISOR OVERALL ASSESSMENT\* AND COMMENTS:**

**REVIEW OF PERFORMANCE ATTRIBUTES**

**(Supervisor to enter comments and assessment\* for each performance attribute.)**

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: \_\_\_\_\_

**OVERALL ANNUAL PERFORMANCE REVIEW ASSESSMENT\* AND COMMENTS:** Assessment: \_\_\_\_\_  
(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?

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

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

Council Representative signature \_\_\_\_\_ Date \_\_\_\_\_

Personnel Committee Member signature \_\_\_\_\_ Date \_\_\_\_\_

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