

**[CHURCH NAME]**  
**CHURCH SECRETARY/CLERICAL PERFORMANCE EVALUATION/POLICY**

**PURPOSE:**

- To evaluate an employee's performance in the areas of content, environment, volunteerism, and personal attitude.
- To assist the employee in identifying skill levels, strengths and opportunities for improvement.
- To monitor on-the-job progress.
- To improve productivity.
- To improve communication between supervisor and employee and improve supervisor awareness of work being done.
- To better understand organizational goals, objectives and strategies.
- To identify developmental training needs.
- To establish a model of accountability.
- To review and establish the employee's job description from the review year to the next year.

**PROCEDURE:**

1. All regular full-time staff is required to undergo a formal performance appraisal review at least once per year. The annual review will take place on or about the employment anniversary date of the employee.
2. Human Resources will notify each supervisor for the need for each employee's appraisal at least one month prior to its due date. This notification will include the necessary blank forms needed for this process.
3. The supervisor should explain the process of evaluation to the employee upon receipt of the notification and establish a meeting time two weeks in advance. This explanation should be positive in nature and it should include the fact that the process is critical to the church and it's in the employee's best interest. Where appropriate, an up-to-date and agreed upon job description should be made available to the employee at this time.
4. At least one hour should be set aside for this appraisal meeting.
5. Upon receipt of the forms, the employee shall undergo a self-appraisal by completing the forms and submitting them to their appraiser (supervisor), before the appraisal interview.
6. Following the appraisal interview, the incumbent and their supervisor should sign the forms.
7. The employee will retain a copy as does the originating department and 1 copy is sent to Human Resources to be filed separately from the personnel file for a period of 2 years.
8. A training needs inventory will be maintained by Human Resources for use in feedback to employees.

**APPRAISER GUIDELINES:**

1. **Do not** administer a performance appraisal at the time when formal disciplinary proceedings are under way with an individual employee.
2. **Do not** evaluate attitude per se, but instead evaluate attitude as it's manifested by one's behavior.

3. There should be no surprises during the performance appraisal process. Any concerns should have been highlighted with an employee as they arise during the year.
4. Plan carefully. **Do not** rely on your memory. Keep records and notes throughout the year.
5. **Do not** blame weak performance on an employee's character.
6. **Do not** have the entire appraisal form filled out before the meeting. Leave room for comments resulting from the discussion.
7. Ensure that each performance criteria judgment is substantiated by at least one example.
8. Judge the work, not the person.
9. Look not only at the outcome, but also the method.
10. Set a specific agenda and keep the discussion on track.
11. Ask for and allow the employee to give feedback, which might involve comments on your supervision.
12. Be aware of alternative training paths, i.e., job redesign, rotation, etc.
13. **Do not** compare an employee to a coworker, as this could raise the question of favoritism.

#### **OBJECTIVE:**

Although daily assessment is a vital function of every supervisor, a formal performance appraisal provides for a comprehensive discussion of overall employee performance.

Purposes of the review are many, but generally the exercise should address the following areas:

- To assess performance/skill levels
- To improve communication flow
- To define training needs

#### **PREPARATION:**

Certain prerequisites should be set in order to affect a meaningful review:

Before the interview, you should review the employee's job description, the previous performance appraisal, as well as any specific tasks, projects or objectives that were assigned during the past year. A minimum of five days should be provided for the employee to prepare for the uninterrupted discussion that will follow.

#### **INTERVIEW GUIDELINES:**

1. Ensure that the employee has completed their appraisal before the interview.
2. Accentuate the positive but be candid.
3. Support statements about performance/behavior with examples.
4. Set realistic goals.
5. Be aware of Personal biases, criticism of personality traits/attitudes, comparison to another specific employee or false standards.
6. Ensure adherence to proposed work plans, goals and job descriptions

#### **FILING:**

Performance appraisals are maintained for a maximum of two years in Human Resources, filed separately from the personnel files. The direct supervisor and employee should retain a signed copy of the completed appraisal.

**[CHURCH NAME]**  
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Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_  
Job Title: \_\_\_\_\_ Dept.: \_\_\_\_\_  
Start Date: \_\_\_\_\_ Date Appraisal Completed: \_\_\_\_\_  
Date of Previous Appraisal: \_\_\_\_\_ Evaluated By: \_\_\_\_\_

**HOW TO:**

- Circle a number 1 through 5 that describes the employee's performance in each subtopic corresponding with each specific area of content, environment, volunteerism and personal attitude.
- The rating descriptions are as follows:

1. Performance does not meet minimum requirements.
  2. Performance sometimes meets requirements and expectations but is not consistent. Improvement may be needed.
  3. Performance meets requirements and expectations.
  4. Performance meets and, at times, exceeds expectations and requirements.
  5. Performance consistently exceeds expectations and offers unique and exceptional accomplishments.
- Additional notes are not necessary, but you may attach an additional sheet if wanted (both parties must sign each additional sheet). There is room available for comments after each area.
- Be honest and remember the overall employee target when filling out the review. [Church Name] strives to provide unforgettable experiences, and each employee is required to do the same.

**Overall Employee Target:** To provide 52 unforgettable experiences by turning on lights and building bridges to seekers. There are 4 overall areas in which we will achieve this target. They are **CONTENT, ENVIRONMENT, VOLUNTEERISM, and PERSONAL ATTITUDE.**

**Administration Use Only**

Current Salary: \_\_\_\_\_ New Salary: \_\_\_\_\_  
Additional \_\_\_\_\_  
Notes: \_\_\_\_\_  
\_\_\_\_\_

**Employee Performance Evaluation**

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_

- 1. Performance does not meet minimum requirements.
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**Overall Employee Target:** To provide 52 unforgettable experiences by turning on lights and building bridges to seekers. There are 4 overall areas in which we will achieve this target. They are **CONTENT, ENVIRONMENT, VOLUNTEERISM, and PERSONAL ATTITUDE.**

**CONTENT** (The material and curriculum for your Ministry)

**1. Job Knowledge:** The understanding of work duties which an individual should know for satisfactory performance, able to react to specific ministry needs.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2. Reliability:** To do required responsibilities well with a minimum amount of supervision, requires little follow-up, completes tasks in a timely fashion.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**3. Quality of Work:** The value of work performed along with the accuracy, neatness, completeness, and timeliness.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Employee Performance Evaluation**

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_

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**4. Preventing or Coping with Problems while Staying Calm:** Independent action in dealing with variety and complexity of duties while staying calm with no anxiety.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ENVIRONMENT** (The appearance that helps the guest feel comfortable yet engaged)

**1. Coordination:** The ability to coordinate an atmosphere that everyone feels welcome and a part of the experience.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2. Innovation and Creativity:** The talent for having innovative ideas, for finding new and better ways of doing things, and for being imaginative.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Employee Performance Evaluation**

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_

- |  |
|--|
| <ol style="list-style-type: none"><li>1. Performance does not meet minimum requirements.</li><li>2. Performance sometimes meets requirements and expectations but is not consistent. Improvement may be needed.</li><li>3. Performance meets requirements and expectations.</li><li>4. Performance meets and, at times, exceeds expectations and requirements.</li><li>5. Performance consistently exceeds expectations and offers unique and exceptional accomplishments.</li></ol> |
|--|

**3. Team Player:** Demonstrates a team mentality, care and concern for others, cooperative with co-workers, supervisors and guests, communicates to all well and doesn't get offended easily.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**4. Organizational Skills:** Demonstrates an organized way to get plans into effect that benefits the ministry and the entire staff.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**5. Self-Motivational Skills:** Demonstrates ability to work and start new projects without being pushed to do it.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**VOLUNTEERISM** (Celebrating with and serving our volunteers in a way that encourages and equips them to be effective in Ministry)

**1. Communication:** Able to effectively communicate the purpose and plan of a project and the ministry one-on-one and in a group.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2. Disposition:** A thankful, positive state of mind that will highly influence the outcome of any given task.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**3. People-Oriented:** Demonstrates genuine willingness to minister to everyone, builds personal relationships, and provides a sincere and warm atmosphere for each individual.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Employee Performance Evaluation**

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**PERSONAL ATTITUDE** (An individual's attitude exhibited towards ministry, people, and the work environment)

**1. Leadership:** The ability to influence others in a way to complete a given assignment.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2. Loyalty:** Shows evidence of character that supports [Church Name], its leadership, and the effort towards changed lives.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**3. Commitment:** Positive, enthusiastic/optimistic approach and takes pride in working toward organizational objectives.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**Employee Performance Evaluation**

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Date: \_\_\_\_\_

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**4. Respect:** Displays an approach of valuing, trusting, and listening to peers and supervisors.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**5. Efficiency:** Displays effective time management skills and always follows the projects through to completion.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**6. Respect:** Displays an approach of valuing, trusting, and listening to peers and supervisors.

1                      2                      3                      4                      5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Overall Performance Rating:** \_\_\_\_\_  
**Employee Signature:** \_\_\_\_\_  
**Supervisor Signature:** \_\_\_\_\_  
**Date:** \_\_\_\_\_

**[CHURCH NAME]**  
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The space is provided below for a record of the results of the appraisal discussion, i.e., what plan were made and what specific action is to be taken by the employee and supervisor.

**1. DEVELOPMENT PLAN FOR IMPROVEMENT**

Objectives (Actions to be taken by employee)	Supervisor's Commitment to Action (e.g., training)	Budget Approved	Target Date for Completion
		<input type="checkbox"/>	

**2. JOB INTERESTS**

Employee's Interests	Supervisor's Comments

**3. COMMENTS REGARDING THIS APPRAISAL MEETING (e.g., thoroughness, adequate time, location and openness).**

Employee's Comments	Supervisor's Comments

**SIGNATURES:**

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Immediate Supervisor's Signature

\_\_\_\_\_  
Date

Revised Date: \_\_\_\_\_