

The **Methodist** Church 

Lay Employee Performance and Development Review

*For lay employees working for the Methodist
Church in districts, circuits or churches*



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ANNUAL PERFORMANCE AND DEVELOPMENT REVIEW FOR LAY EMPLOYEES WORKING IN DISTRICTS, CIRCUITS OR CHURCHES

INTRODUCTION

A review is recommended for lay employees after their first three months in post and annually thereafter. The review should be conducted between the employee and their line manager in a confidential setting. It should be seen as an opportunity for guided reflection and encouragement.

WHY?

Good review systems enable both parties to:

- organise and monitor work
 - build on successes and learn from failures
 - work with the individual within a team and circuit structure
 - see things from more than one angle and how the work relates to the wider Church
 - look at short and long term plans, priorities, and training needs
 - raise issues and ask questions
 - overview the job description
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HOW?

Establish a date before the end of the probationary period, or year-end, when the review meeting will be mutually convenient, normally at least two weeks ahead. Allocate at least two hours for the appointment if appropriate. Locate the job description, any additional working objectives and the church/circuit mission statement (if applicable).

With the framework of this document (or similar) as a guide, both parties should utilise the two-week space before the meeting to conduct two tasks:

- to reflect on the previous period
- to ask others within the district, circuit or church for constructive feedback

In this context consideration should also be made of the job description and whether it is still accurate, or whether any amendments are needed to reflect changes that have taken place. Reflection should be made on previous work objectives and an exploration sought as to whether the job developments meet the needs of the district, circuit or church and its

mission.

During this period, make notes as appropriate and begin to formulate ideas for:

- objectives for the coming period
- training and development plans

Agree whether you will exchange your respective notes prior to the meeting, and if so when. (Exchanging is often helpful as it ensures both parties know what the other will raise.)

Approach the review meeting positively and consider praying together. It is recommended that the line manager takes notes – recording the outcomes of the discussion rather than the detail of the conversation.

Work through each section of the form as it is felt appropriate, exchanging information and perspectives. Explore the areas of agreement and disagreement. Conduct the meeting with a variety of techniques:

- Use of questions
- Use of examples
- Concentrating on the key issues which will make a difference
- Self assessment
- Focussing on the job, not the personality

Form objectives for the coming period which are Specific, Measurable, Achievable, Relevant, and time targeted (SMART) and can relate to:

- Work outcomes
- Training and development
- Personal development

S – Specific

When setting a goal, be specific about what you want to accomplish. This isn't a detailed list of how you're going to meet a goal, but it should include an answer to the popular 'w' questions:

- Who – Consider who needs to be involved to achieve the goal (this is especially important when you're working on a group project)
- What – Think about exactly what you are trying to accomplish and don't be afraid to get very detailed.
- When – You'll get more specific about this question under the "time-bound" section of defining S.M.A.R.T. goals, but you should at least set a time frame.
- Where – This question may not always apply, especially if you're setting personal goals, but if there's a location or relevant event, identify it here.
- Which – Determine any related obstacles or requirements. This question can be beneficial in deciding if your goal is relevant.
- Why – What is the reason or purpose for the goal?

M – Measurable

What metrics are you going to use to determine if you meet the goal? This makes a goal more tangible because it provides a way to measure progress. If it's a church or circuit project that's going to take a few months to complete, then set some milestones by considering specific tasks to accomplish.

A – Achievable

This focuses on how important a goal is to you and what you can do to make it attainable and may require developing new skills and changing attitudes. The goal is meant to inspire motivation, not discouragement. Think about how to accomplish the goal and if you have the tools/skills needed. If you don't currently possess those tools/skills, consider what it would take to attain them.

R – Relevant

Relevance refers focusing on something that makes sense with the aspirations of the church/circuit.

T – Time-Bound

Anyone can set goals, but if it lacks realistic timing, chances are you're not going to succeed. Providing a target date for deliverables is imperative. Ask specific questions about the goal deadline and what can be accomplished within that time period. If the goal will take three months to complete, it's useful to define what should be achieved half-way through the process. Providing time constraints also creates a sense of urgency.

Consider how these objectives relate to the district, circuit or church mission statement as well as the job description. In situations where the lay employee wants to pursue an objective or some personal development that does not fit with the employer's objectives, consideration should be given to what kind of support is appropriate in these circumstances.

Complete the 'Notification of Training Needs' and sign the 'Notification of Completion' forms. Copy the document so that both the employee and the line manager may have a record.

If there is not agreement on how any of the changes should be reflected advice should be sought from the District Lay Employment Secretary.

Some examples of SMART Objectives can be found at Appendix A

THE REVIEW FORM

The following review form is intended as a guideline and is not mandatory. It proposes eight sections:

- Section 1 – Present Work
- Section 2 – Management
- Section 3 – Resources
- Section 4 - Work/Life Balance
- Section 5 – Relationship with God **(if applicable)**
- Section 6 – Relationship with Others
- Section 7 – Training and Personal Development
- Section 8 – Objectives for the coming period

Thereafter are documents for 'Notification of Training Needs' and 'Notification of Completion'.

PERFORMANCE AND DEVELOPMENT REVIEW FOR LAY EMPLOYEE

Name:	
Post:	
How long in present job?	

Section 1: Present Work

State briefly the specific objectives of the job description, and/or those agreed at the last review, with particular reference to:

- the aspects you and others feel particularly pleased about.
- your achievements.
- utilisation of the full range of your skills.
- your non-achievements and difficulties.
- things preventing you from using your skills.
- anything unsatisfactory about your work.

Be specific, quote examples.

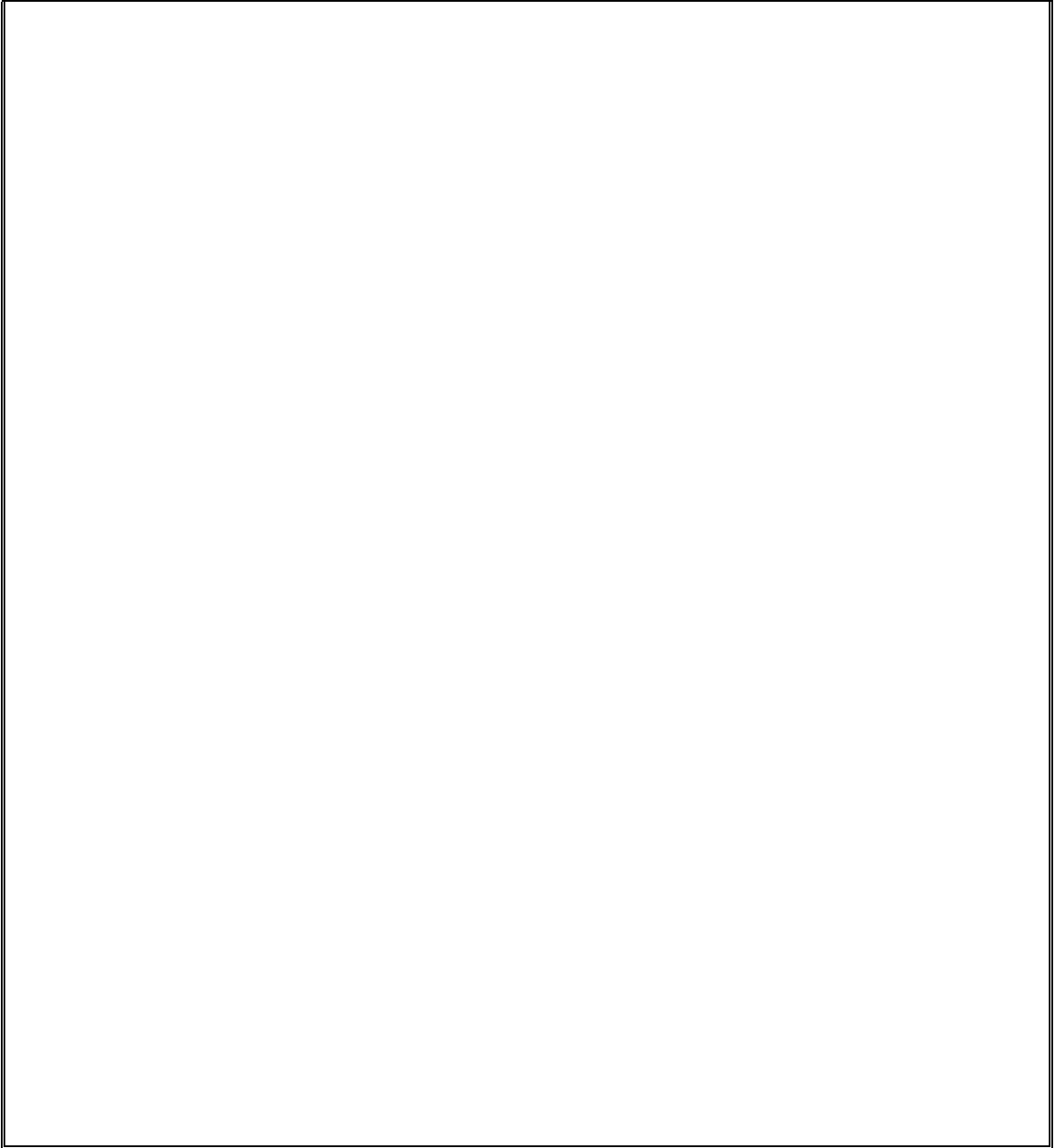
Section 2: Management

Comment on the ways in which your management systems enable you to carry out your work. Consider:

- **ways the support of your Line Manager / Management Support Group might be strengthened**
- **changes to improve standard working practices and procedures**
- **how you are encouraged to participate in decision-making processes**
- **your use of time and prioritisation**

Does your job description need updating?

Has your pay been reviewed this year?



Section 3: Resources

Are the resources given to you sufficient for you to complete your task?

- how might they be strengthened?
- are you on a budget for your expenses and are these limits realistic?

Section 4: Work/Life Balance

Review the following questions:

- Is your work/life balance satisfactory?
- Do the demands of this balance enhance or hinder your work or life?
- How do you organise your time, the quantity of work and find sufficient space for self-replenishment?
- What outstanding difficulties have you encountered with regard to organising your time so that you have a good work/life balance?
- Have there been any particular circumstances that have affected your work in the past year that you feel need to be recognised?

Would a support person/group help in achieving a better work/life balance, or does an existing one need strengthening?

Section 5: Relationship with God (If Applicable)

Are you someone who interprets work in vocational terms? If so, how effectively has your work contributed to your vocation?

Are your opportunities for worship and fellowship supporting your faith development?

Have you considered asking someone to be your Spiritual Director?

Have you had an opportunity for a retreat this year?

Section 6: Relationship with Others

Reflect upon the ways your working relationships enable your role:

- What has been satisfying and/or positive about your working relationships?
- What has been frustrating and/or inhibiting in your work with others?
- Do your communication skills enhance your task?
- How might you contribute further to the working teams of which you are a part?

Section 7: Training and Personal Development

What strengths have been highlighted? Identify any related training and development needs.

What areas of opportunity are identified? Identify any related training and development needs

What potential is there for your own development in the current job or other roles? Identify any training and development needs

Do you feel you have any untapped skills that may be developed?

How might the quality of your work be improved or your competence for particular tasks be increased? Identify any training and development needs

What training, development or review, do you consider might be beneficial to those you work with?

In what way could the job change in the foreseeable future?

Also include this list of priorities for training and development needs on the following objectives page.

Section 8 – Objectives for the coming period

List objectives here for the coming period – be specific, measurable, achievable, relevant, and time targeted (SMART)

Target date

PERFORMANCE AND DEVELOPMENT REVIEW
Notification of Training Needs

Confidential

Name:

Post:

Please indicate any training or development needs relating to your work that have been identified during the review.

Please indicate how these needs are planned to be met.

PERFORMANCE AND DEVELOPMENT REVIEW
Notification of Completion

Confidential

Please complete this form at the end of the review discussion. It should be retained by the Line Manager.

Name of Lay Employee:

Name of Line Manager:

Date of discussion:

We certify that the review took place on the date recorded above, that other relevant information has been recorded and that training and development needs have been entered on the "Notification of Training Needs" form.

Signature of Lay Employee: _____

Signature of Line Manager: _____

Any other comments:

Appendix A

Examples of SMART Objectives

- Set up monthly meetings with the Circuit Treasurer to enable accountability of petty cash and procurement of office supplies by end February 20xx
- Plan and deliver two Messy Church activities in xxxx Methodist Church by April 20xx
- To set up a group to review internal and external communication within the Circuit by May 20xx and provide recommendations for the future by September 20xx
- Review all of the mission related activities within xx Methodist Church and provide a report to the Circuit Council by November 20xx