

Appendix 3.2
Annual Review Process
Approved: December 7, 2022

Background

One of the duties of the Grace United Church (GUC) Ministry and Personnel Committee (M&P) is to “review and evaluate annually the effectiveness of the staff of the Community of Faith as those persons and positions relate to the mission of the Community of Faith as defined by the Church Council. The UCC handbook, “Resources for Ministry and Personnel Committees, January 2019”, and predecessor documents provides guidelines on how to conduct Annual Reviews. The Annual Review Process developed by M&P has been modified and updated over the years based on experience and circumstances. The current process is designed to ensure effective reviews while avoiding unnecessary rigor and effort.

Scope

The Annual Review Process (ARP) applies to all GUC Ministry/Lay Staff, although M&P may adopt an alternate process for those who work less than 14 hours per week. The ARP does not apply to persons working for GUC on a contract arrangement.

The ARP is cyclical and culminates with a written Annual Review document.

At the discretion of M&P, some Lay Staff may not have Annual Goals.

Guiding Principles

The Annual Review Process is reliant on key documents and practices as a basis for effective reviews:

1. The Model of Multiple Staff Ministry describes the principles and practices that are fundamental to the practical application of the shared leadership model adopted by GUC.
2. Position Descriptions describe the Ministry/Lay Staff activities and outcomes. Position Descriptions should be reviewed at the discretion of M&P (typically, every 5 years, more often if major changes occur).
3. Ministry/Lay Staff will be guided, in part, by Annual Goals, often developed in consultation with the relevant committees of Council. At the discretion of M&P, some staff may not be required to have Annual Goals.
4. Candid participation by the Ministry/Lay Staff, M&P members and relevant Committees is critical.

Annual Review Timeline/Activities

Summer - Goal Setting - Ministry/Lay Staff will develop draft Annual Goals that reflect key areas of focus for the 12 months starting in September. They will consult informally with the M&P Contact and the relevant Committees to check for alignment and support.

Annual Goals are usually activities that are a) not clearly covered in the position description and b) usually of a fixed (one or multi-year) duration. They can be individual or team goals as well as personal development goals.

The final Annual Goals will be documented using the Annual Goals Form as a template and shared with the M&P Contact and relevant Committees by September 30.

September to September – Ongoing Dialogue - A designated M&P Contact will dialogue regularly (at least once per quarter) with each Ministry/Lay Staff person to discuss, “How is the work going?”. Ministry/Lay Staff are also encouraged to dialogue regularly with relevant committees regarding their activities and goals. These dialogues may inform the Annual Review but are not intended to be a substitute for the ARP.

April/May – Review Discussion – The M&P Contact and the Staff member will meet at least once to discuss the performance results. Topics for discussion should include:

1. Accomplishments and results related to the Job Description duties.
2. Accomplishments, progress and results related to the Annual Goals.

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3. What went well during the year?
4. What could have been better during the year?
5. Input received from the relevant committees by the M&P Contact and/or the Staff member.
6. Opportunities for improvements and barriers to progress/success.
7. Other topics that relate to the Staff member's performance or contributions in their role.
8. Recommendations for change or improvement.

June – Document the Review – The M&P Contact and the Staff member will collaborate to document the review using the Annual Review Summary Form as a template. The final document, along with a summary of recommendations arising from the review will be placed in the M&P confidential files.

September/October – M&P Report to Council – Matters may arise during the review that should be referred to the Council or another committee for resolution. M&P will consult with the Staff member regarding issues to be referred elsewhere. M&P will report the status of reviews to Council at the September or October meeting.

References

Grace United Church Constitution Rev. 8.1, February 28, 2022

Model of Multiple Staff Ministry, Appendix 3.1, GUC Constitution

Resources for Ministry and Personnel Committees, January 2019, UCC

Attachments

#1 - Annual Goals Form

#2 - Annual Evaluation Summary Form

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Attachment #1 - Annual Goals Form**

1. Incumbent:

2. Annual Goals for this Position: (These are activities that are a) not clearly covered in the position description and b) usually of a fixed (one or multi-year) duration. They can be individual or team goals as well as personal development goals. If they are not aligned with one of the Key Result Areas of The Grace Model the incumbent should state how these goals fit into the Mission Strategy of Grace United Church).

Key Result Area	Major Activity and Related Committees
Worship	
Inreach	
Outreach	
Teaching	
Proclamation	
Governance	

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Attachment #2 – Annual Evaluation Summary Form

Date:

Position:

Incumbent:

Background Information:

Areas of Strength

Areas to Improve

Issues/Obstacles to Fulfilling Responsibilities

Overall Performance Evaluation

Plans for Development for next year

Comments:

Incumbent

Personnel Committee