

## **INFORMAL REVIEW (IR) STEPS FOR DELEGATES**

### **Step 1: Preparation of the Informal Review Form (see Form 1-IR)**

1. Customize the Informal Review Form based on the pastor's current Job Description (JD):
  - i. Insert the Major Responsibilities, Key Activities, Standards of Performance as provided for in the template. Standards of Performance may need to be formed into a complete sentence, depending on how they're written in the JD.
  - ii. Include the core competencies from the JD
  - iii. Include the congregational core values
2. Make 3 copies.

### **Step 2: Participants in the Informal Review:**

1. Pastor (fully completes the form)
2. Delegate
3. In consultation with the Pastor, either one more board member OR a key ministry team leader (in a church with multiple delegates, if the delegate is not serving on the board then the third person must be a board member).

Delegate distributes the Informal Review forms (prepared in Step 1) to the three individuals, with a target date for completion. The delegate tallies the three sets of scores and averages them (see Form 3). This average score is reported on Form 5-IR. Comments are recorded on Form 4.

### **Step 3: The Informal Review Results Sharing Session (see Form 5-IR)**

1. Make arrangements for the three persons to meet together.
2. Each shares scores and comments (forms 3 & 4); pastor can see where s/he may be too hard or too lenient regarding performance.
3. Revisit the Standards of Performance themselves: are they still reflective of current ministry, are they clear, measurable, etc. If not, then draft some changes to be presented to the board for further discussion and approval.
4. Based on the growth areas, agree upon a focus for ongoing leadership development/continuing education for the pastor.
5. Complete and sign Form 5-IR; average score is reported.

### **Step 4: Communication**

1. Send a copy of Form 5-IR to the Credentialing Coordinator office.
2. Communicate to the board that the informal review has happened; the norm is to share the Form 5-IR report.
3. Address any needed changes to the JD itself identified through the review; this will help with next year's Informal Review or Performance Appraisal.