



INFORMAL REVIEW STEPS FOR DELEGATES

Step 1: Preparation of the Performance Appraisal Form (see Form 1)

1. Customize the Performance Appraisal 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 value
2. Make 3 copies.

Step 2: Participants in the Informal Review:

- a. Pastor (fully completes the form)
- b. Delegate
- c. 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 Performance Appraisal forms (prepared in Step 1) to the three individuals, with a target date for completion. As this is an informal review, the delegate and other leader do complete the form but the self-evaluation from the pastor is the score that will be recorded.

Step 3: The Informal Review Results Sharing Session (see Form 5)

1. Make arrangements for the three persons to meet together.
2. Each shares scores and comments; pastor can see where s/he may be too hard or too lenient regarding performance.
3. Revisit the Standards of Performance in the current JD: 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 (score used is the pastor's self-evaluation).

Step 4: Communication

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

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