
*Guidelines
for
Position
Descriptions,
Goal Setting,
and
Performance Reviews*

*for M&P Committees
in Toronto Conference*

*(Based on a document prepared by the Rev. Eilert Frerichs in 1996, adapted and updated by
Lillian Perigoe and Patti James, 2003 and 2005)*

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Material prepared for the use of M&P Committees in Toronto Conference.
For more information, contact Patti James, at the Conference Office: 416-241-2677 ex. 25.
65 Mayall Ave., Downsview, Ont. M3L 1E7; 416-241-2677; or e-mail lperigo@bellnet.ca or
pjames@bellnet.ca

Position Descriptions
for
Ministry Personnel

Ministry Personnel – General Guidelines

(From this point, citations from The Manual of The United Church of Canada will be indicated by numerical references in parentheses referring to appropriate sections of The Manual, 2004.)

- **NOTE: Many forms, handbooks, guidelines and policy statements are available on the United Church web-site at www.united-church.ca. Check out this resource. Many are also available through UCRD - United Church Resource Distribution. (1-800-288-736 or 416-253-5456; www.united-church.ca/ucrd.)**

Remember:

Vacancies for ministry personnel are only declared after a needs assessment has been completed (51.1) and presbytery has approved the report of a Joint Needs Assessment Committee, including a position description (50-53, 58). The following guidelines are designed to help with updating an existing position description or changing a position description in the light of M&P committee work related to annual reviews NOTE: Substantial revisions to a position description constitute a “change in the terms of call” and require presbytery approval (51). Contact your Presbytery Pastoral Relations Committee or Lillian Perigoe at the Toronto Conference office if you have questions about this issue.

“**Ministry personnel**” (001) is a term signifying employees in presbytery-accountable positions and fulfilling one or many of the functions of ministry. Ordained and Diaconal Ministers (001), members of the Order of Ministry, are the largest group. Ordained personnel are trained primarily in word, sacrament, and pastoral care, whereas diaconal personnel are commissioned to focus primarily on education, service, and pastoral care. Understanding the different characteristics of each form of ministry can be helpful in developing position descriptions, particularly for multiple-staff ministries.

Other categories of ministry personnel include Lay Pastoral Ministers (in Training) and Staff Associates. A simple distinction is that the first are lay people who are not ordained but have been recognized and trained by the church to fulfill ordained functions while staff associates are lay people who generally perform diaconal functions, and who have education, training or life experience appropriate to those functions (e.g. pastoral care, counselling, drama and music, nursing, youth work, etc.) There are other categories of ministry personnel. If you need to research these, talk to your presbytery’s Pastoral Relations Committee.

The 14-hour rule: It is mandatory and a condition of employment for all ministry personnel who work 14 hours or more per week to participate in the United Church’s pension plan, and core group insurance plan. Enrolment in the pension plan is mandatory and a condition of employment for all lay personnel, hired after December 31, 1988, and working 14 or more hours per week. Enrolment is also mandatory if employees work less than 14 hours per week but, during the last two years, have earned at least 25% of the CPP Year’s Maximum Pensionable Earnings, or have worked at least 700 hours in each of the last two consecutive years. As with lay employees, optional coverage is at the discretion of the individual. (See *Our Pension Plan: A Summary of the Pension Plan Constitution*, revised 2001, available from General Council: Ministry and

Employment Policies and Services [MEPS]. A helpful guide to such issues is the *Financial Handbook for Congregations*, available on the UCC web-site or from UCRD.)

Congregational Accountable Ministry: (001)

This term describes a paid accountable ministry position of less than 8 hours per week, exercised by a lay person, in areas of education, outreach, pastoral care, worship, or service. The person is accountable to the pastoral charge through its board or council. Congregations need to consult presbytery prior to making such appointments. (001, 041.1)

Note: As soon as a congregation begins to express a desire for additional staff, it also needs to begin consulting with presbytery for guidance to clarify terms, including the differences between Congregational Accountable and Presbytery Accountable Ministries, and to understand the process related to needs assessments and developing position descriptions. Otherwise, it may have to back up or start all over again.

Accountability

Ministry personnel are accountable to the Official Board or Council through the M&P Committee (067; 244). They are also accountable to presbytery (see below). The M&P Committee is 'a confidential, consultative body that supports the pastoral relationship'. (189,211,226, 244) See *A Handbook for Ministry & Personnel Committees*, UCC, 1999, revised 2003, available on the UCC web-site. (Subsequently referred to as "M&P Handbook")

It can be useful for a representative from the M&P Committee to attend staff meetings on occasion. Enhancing communication and building trust into the system are essential to building healthy relationships; trust is beneficial to all parties, especially if conflict arises, and is necessary in order that the M&P Committee may perform its function of providing 'a consultative and supportive agency for the staff of the Pastoral charge and for members and adherents of the Congregation.' (244 c i) As the *M&P Handbook* suggests, it is helpful for the church to "model relationships which reflect an underlying assumption that 'we are in Ministry together'" (p. 8). In such a setting, accountability will become part of a healthy mode of relating.

Remember:

The functions of M&P Committees include support and evaluation as well as accountability.

SUPPORT is paramount for building healthy pastoral relationships.

Ministers are not accountable to one another in a direct supervisory role. This means that in team situations, one minister is not senior to another. Nor does one minister "report" to another, though ongoing communication between ministry personnel in a team is essential. Each individual is accountable to the Board through the M&P Committee. (See also *M&P Handbook* p. 16) Ordered ministers are also accountable to presbytery; that is where their membership lies (067). Therefore, covenanting services following the call or appointment of a minister occur among three parties: minister, congregation, and Presbytery. Discipline of a minister is the responsibility of the Presbytery.

Salary, Housing, Travel, etc.

for Ministry Personnel

Remember:

All ministry personnel positions of more than 14 hours per week require the full range of salary and benefits (pro-rated if part-time). This includes all Presbytery Accountable positions, including LPM's and Staff Associates. This area generates many questions from pastoral charges, especially from treasurers. You will find answers in some of these resources:

- *The United Church Manual, 2004 (section 036)*
- *Financial Handbook for Congregations (updated annually.) Each pastoral charge should have one. It is available on the UCC web-site and from UCRD.*
- *"Salary and Allowance Schedule", published by Ministry and Employment Policies and Services, available on the UCC web-site.*
- *Other forms, handbooks guidelines and policy statements are available on the United Church web-site or through UCRD - United Church Resource Distribution.*

For additional resources and advice: contact Presbytery Pastoral Relations and Pastoral Oversight Committees and the Toronto Conference Minister for Personnel Policy and Support.

Calculating Salary

Minimum salaries are set each year by General Council or its Executive. These ensure that, regardless of geography or other factors, all ministry personnel are assured of a minimum salary. The salary schedule is based on experience; category levels cover 2-3 years (036a) The recommended salary increase takes place each year on January 1.

Some pastoral charges pay at a percentage above minimum. A helpful guideline for a multiple-staff ministry: equalizing the pay scale for team ministers is an important step in building trust and respect, especially when years of experience do differ between personnel. In some situations, team ministry personnel are paid the same amount and increases each year are also equal. Many are paid the same percentage above category, but their categories are individual, based on experience. You may want to explore salary systems with your personnel and with your Official Board.

Part-time ministry personnel are paid at the same rate, pro-rated, based on a 40-hour week. People sometimes express confusion about allowances for vacation and continuing education for part-time personnel, but consider it this way: a month's vacation is a month's paid vacation. A minister working halftime receives the same amount of vacation time, but is paid at the half-time rate. The same calculation applies to the study leave allowance. Three weeks is allowed, regardless of the number of hours per week. For comments on remuneration of part-time personnel see *The Manual* (036b). For information about issues related to compensation and the ongoing 'Compensation Study' of the United Church of Canada, see '[Connex](#)', Vol.2, available on the UCC web-site.

Housing Questions:

All ministry personnel must be provided with either a manse or an equivalent housing allowance as part of salary. (036.f)

Do staff associates receive housing allowance?

Yes, it is part of the salary package.

How is a housing allowance calculated ?

Ministry personnel may deduct the fair rental value of the home they occupy. That fair rental value, rather than the housing allowance, determines how much of a deduction ministry personnel may claim. Housing allowances are calculated as part of salary packages, with the guidance of presbytery guidelines set on the basis of the fair rental market costs of housing in the vicinity of the pastoral charge and as a measure designed to provide some equity in remuneration. Presbyteries review those figures every three years. (036 f) Check with your local presbytery before making changes.

If the fair housing value for your church is set, and your minister pays rent, tax law allows him/her to claim only the actual value of the rent. The balance is taxable. People often confuse the two systems: the Church administers the housing policy as part of salary; Canada Revenue Agency administers the housing deduction as part of income-tax legislation. The two are not related. The Clergy Residence Deduction form (T1223E) can be obtained from CRA and is also available in the *Financial Handbook for Congregations*.

Housing allowances for ministry personnel in multiple-staff / team situations, are equal, since they are calculated on the basis of fair rental value in the vicinity of the pastoral charge. Please note: the issue is not where the person chooses to live, or an individual's housing needs, but the fair rental value in the pastoral charge's community.

Some churches offer higher housing allowances to ministers in order to appear more attractive, and, in fact, the housing allowances set by presbytery are minimum guidelines. However, it is fairer, and easier from a taxation standpoint, to offer the mandated amount of housing and a higher salary. The salary is taxable income, true, but it is also income that is fully pensionable, and, thus, a better long-term benefit.

Travel Allowance

The Manual (2004) of The United Church of Canada sets a 'per kilometre rate' as the method for calculating travel allowances. In 2005, that rate is 36 cents per kilometre traveled. This amount is set by General Council in accordance with the CRA determination of "reasonable" and is a minimum rate. Pastoral charges may pay at a higher rate, but not a lower rate. (036.h)

For tax purposes, travel must be work-related, exclusive of travel from one's home to the office. Since all work-related travel must be based on actual distance driven and must be justifiable, a log or record needs to be kept. Please ensure, for their own protection, that staff members keep such records. It may be helpful to set up a computerized recording system. The usual way to claim travel expenses is monthly. Ministers typically tally up their mileage at the end of a month, and invoice the treasurer for the amount. Such a system is helpful and efficient. Some

treasurers prefer to do the calculation quarterly. (See the *Financial Handbook for Congregations*, section 4.4.4.)

Lump-sum travel amounts are not advisable, although such arrangements are sometimes made. Such is not the policy of The United Church of Canada, and may cause ministers a problem with CRA. See the *Financial Handbook for Congregations* for more guidance, particularly 'Alternative Method of Payment', section 4.4.4.4.

Travel while on leave or disability:

An income supplement is payable while a minister is on leave, calculated at 40% of the average usual monthly travel claim. However, in this case, the amount is fully taxable. For more information, see the *Financial Handbook for Congregations: 'Automobile Allowance While on Leave'*, section 4.4.4.5.

Funeral and wedding fees and honoraria:

Congregations have their own policies in this area, although many do not specify that policy.

The tax rule is that honoraria must be included as taxable income.

Pastoral charges with many funerals and weddings per year will want to establish guidelines that are fair, that take into account the time of the minister and other staff members, as well as the use of the church building, that recognize people's desire to show appreciation and thanks, and that encourage ethical practices. You may wish to check with your presbytery about this question as well.

Staff Benefits Policy for Ministry Personnel

(not covered by the call or appointment form)

Holidays with Pay:

Statutory Holidays: New Year's Day
Good Friday
Easter Monday
Victoria Day
Civic Holiday
Canada Day
Labour Day
Thanksgiving Day
Christmas Day
Boxing Day

If church activity (e.g. a Good Friday service) requires ministry personnel to work on a statutory holiday, another day may be taken in lieu of time worked, but not another Sunday.

Vacation Policy

Ministers are entitled to a minimum of one month of vacation within each pastoral year (July 1 to June 30.) The pastoral charge negotiates the minister's vacation through its M&P committee. Some charges prefer that vacations take place during the summer months; others do not specify. Some ministers prefer to divide the time throughout the year. Vacation time is based on a 30-day month. Note: *The Manual* (036.i) does not distinguish between a 4-Sunday month and a 5-Sunday month, though many contracts specify five Sundays of vacation time.

It is helpful if the policy of the charge states that no vacation may be saved beyond the church year; such a policy helps to ensure that vacation is taken, and thus helps prevent burnout and stress.

Compensatory Time

Compensatory time off (e.g. the Sunday after Christmas), may be offered as a matter of course, or through negotiation. The "Salary and Allowances Schedules Applicable to Ministry Personnel, 2005, notes: "It is recommended that hours worked be monitored, and ministry personnel be encouraged to take compensating time equal to hours worked in excess of the standard 40-hour work week (pro-rated for part-time.)" (p. 2)

Sick Leave

Sick leave, as needed, is provided with full salary and benefits. Long periods of illness require a doctor's certificate, and referral to the Conference Personnel Minister, who will help administer the Church's restorative-care or long-term disability plan. (See also section 037.) For information about Restorative Care, see www.united-church.ca/pb/pdf/rcp.pdf.

Note: there is no provision for the banking of sick time.

Maternity/ Paternity Leave

See section 36[o] of The Manual, 2004. Additional information is available through the Conference office.

Bereavement/ Compassionate Leave

See sections 36(p) and 36(q) of The Manual.

Compassionate leave may be arranged for personal emergency situations, in consultation with the M&P committee and the Presbytery. This leave shall normally be 14 days or less and be granted for situations in which the minister is the only person appropriate to respond to the circumstances, or when the minister is unable to carry out pastoral responsibilities because of the circumstances.

Leave of Absence

Unpaid leaves of absence allow an employee to take an extended period of time away with an assurance of returning to their position at a specific time. Such leaves are granted following consultation with the M&P committee, and with the approval of the Board/Council, and the Presbytery. The United Church suggests that pastoral charge use the best standards for their personnel. Ontario's Employment Standards allow 10 days of emergency unpaid leave to employees.

Disability

In the case of disability, the pastoral charge is responsible for the first 6 months of salary and benefits (with a slight adjustment to the travel benefit). The costs are substantially covered by the Restorative Care Plan. After this period, the minister moves to LTD and receives income from the UCC's insurance company, but the pastoral relationship does not end automatically. Consult with your Conference Minister for Personnel Policy and Support should this situation arise. (037)

The Employee Assistance Program (EAP)

The Employee Assistance Program is available for all members of the Group Insurance Plan and for Candidates for Ministry. It provides short-term, solution-focused counselling as well as advice in areas as diverse as financial planning and nutrition, and in specialized areas such as pastoral care supervision. EAP offers a referral service, in person, by phone and by e-mail. Members may log on to online support and resources, as well as 'e-counselling' services. Employees who have a particular need in counselling may contact the Conference Minister for Personnel Policy and Support for advice.

Administration: staff meetings
expectations re computers, communications, planning

Education/ Faith Formation: children, youth, adults
baptismal and membership preparation

(Other headings to consider: community outreach, mission and justice work, presbytery and conference roles, study time and spiritual growth.)

ACCOUNTABILITY

Be clear about the lines of *support* as well as *evaluation* and *accountability*.
Clarify expectations concerning accountability to the M&P committee.
Clarify the role of this staff person vis-à-vis other staff persons.
State how often the position and the person will be evaluated/reviewed.

REQUIREMENTS

Status (i.e. ordained, diaconal, LPM, LPMiT, staff associate)
Essential skills and/or training required
Desired skills
Personal characteristics, if applicable

WORKING CONDITIONS

Salary and benefits
Increment policy
Office hours, if applicable
Vacation and Compensatory Time
Continuing Education
Sick Leave

Sample Position Description:

Ministry Personnel

Position Title: Minister

General Description:

The minister for (N - the pastoral charge) has responsibility for the overall worship and spiritual life of (N). The minister will have general day-to-day responsibilities for the church office, and will play a key communication role between the points of this multi-point charge.

Working Hours:

The standard work week is 40 hours.

Areas of Responsibility:

Preaching and Worship

- working with the Worship Committee / Session and others to plan and coordinate worship services
- helping lay participants to prepare for their roles
- working with the music director to review and select hymns and special music
- overseeing preparation of orders of service
- preaching most Sundays, except vacation or special services.

Time requirement: 12.5 hours per week

Pastoral Care

- setting priorities for visiting people in hospital and shut-ins
- providing communion to (N - nursing home) once a month
- training lay visitors/elders to participate in occasional visiting
- home visits to members as time permits
- providing crisis care and counseling, as required
- *(Note: weddings and funerals are seen as part of pastoral care.)*

Time requirement: 12.5 hours per week

Administration

- Communications: letters / emails / phone calls
- planning for meetings
- attending Official Board and session meetings
- acting as ex-officio member of other committees and providing assistance as needed

Time requirement: 7 hours per week

Education

- meeting monthly with the Church School Coordinator to plan integration of worship and Church School
- helping with twice-yearly teacher training events
- conducting Bible study/other small groups study sessions for adult education, one series per year

Time requirement: 4 hours per week

Outreach

- meeting monthly with other ministers in the area
- initiating and acting as a resource for programs with lay volunteers

Time requirement: 2 hours per week

Presbytery and Conference Meetings

- attending Presbytery / Conference meetings as required
- serving on one Presbytery committee

Time requirement: 1.5 hours per week (average)

Study Time

- taking time for spiritual nurture and study.
- building daily devotional time into the day's routine, as required.
- Note: Blocks of time for Continuing Education, including retreats and reading weeks, may be negotiated with the M&P Committee.

Time requirement: varies

Accountability

- The minister is accountable to the Official Board of the pastoral charge, through the M&P Committee. The M&P Committee will appoint a liaison person to support and encourage the minister's work, and to keep open the lines of communication between Board, congregation, and minister.
- The minister is also accountable to (N. Presbytery), as one of the parties to the covenant.
- Changes to the position description, or to the terms of the call, or to the working conditions, may only be made after full negotiation with all three parties: the minister, the charge, and the presbytery.
- The minister is responsible for day-to-day support of the church secretary, but is not responsible for oversight or supervision.

There will be an annual performance review through the M&P Committee.

Requirements

- Ordination (or commissioning) in the United Church of Canada
- Pastoral skills.
- Preaching, teaching, leadership skills an asset.
- Continuing education to be negotiated with the M&P committee.

Working Conditions

- Salary and benefits as per the call form
- Increments to salary and benefits, in consultation with the M&P Committee and Official Board.
- Office hours: the minister is expected to maintain regular office hours.
- Vacation: one month, preferably taken in the summer
- Sick Leave: over 5 days, requires medical certificate.
- Long periods of illness or disability: section 37 of the Manual applies.

Special Considerations:

Part-time Position Descriptions

- Part-time positions are pro-rated on a 40-hour week. (036)
- Positions (lay or ordered) of 14 or more hours per week must participate in the United Church of Canada's Pension and Group Insurance plan. Lay personnel hired before January 1989 are exempt from this rule, if they so choose.
- Lay ministry personnel working 8 hours per week or more are in Presbytery Accountable positions; those working fewer than 8 hours are in Congregational Accountable Ministry (001, 041.1)

Position Descriptions for Part-time Ministry Personnel:

If the part-time ministry is a solo position: Consider that one person cannot fulfill the complete range of ministerial tasks and goals in a part-time position. Care must be taken to outline a fair description of the expected responsibilities. Base the description on the data collected through the process of needs assessment. Solo ministry personnel who are not ordained, commissioned or recognized as Lay Pastoral Ministers, (i.e. Student or Candidate Supply, LPMiT, Intern Supply) require pastoral charge supervisors appointed by Presbytery.

If team ministry: consider that teams often need to spend additional time in planning, administration and consultation. Some congregational meetings need to be attended by all ministers. Weekly team meetings are a helpful practice, building confidence and trust in the team, but also require extra time. Part-time ministers need support and encouragement from the M&P Committee, especially since there may be an inclination to overwork.

Special Issues for Position Descriptions for Those in Team Ministry

- The pastoral charge needs to be clear in its expectations related to the 'team model', before adequate position descriptions can be designed. (124, 125)
- Members of the M&P Committee themselves need to be clear about the ramifications and expectations associated with various team models. Some teams include all paid staff, including custodians and secretaries; other team models relate to ministerial staff only.
- For a more comprehensive treatment of this subject, refer to the document "How Will We Team?" available from the Conference office, or from UCRD, for a small charge (50000084).

Ground work and planning are crucial to the success of team ministry. Board discussions, staff retreats, and team meetings with the M&P Committee all contribute to helping the congregation learn about teaming and understand its implications for the pastoral charge. **Note: this process needs to continue after the search/appointment/call process.**

In looking for team ministers, determine ahead of time what your criteria might be for a person with a "team" approach and personality.

Every effort needs to be made to "equalize" the playing field for a team in ministry. Issues of power and trust seem to be paramount in many team situations. You can help by working through some of these issues with your ministers before the issues become problems. Remember that the benefits of a successful team ministry are worth the extra effort.

Issues Relating to Interim Ministry

In designing a position description for an interim minister, consider that such ministry is a specialty. There are generally five developmental tasks that need to be included. They include:

- coming to terms with the past
- examining the congregation's identity, discovering new identity
- analyzing power/shifts of power
- establishing communication and linkages with the denomination
- preparing for a new minister.

Other goals, arising from the needs assessment, will also have to be included, with time allotted for these as well.

Accountability:

In addition to the accountability expected of regular ministry personnel, there are two other areas of accountability for interim ministry personnel:

- the interim minister works with a steering committee of the pastoral charge, in order to facilitate the work of the interim period, and achieve the mutually agreed-upon goals,

and

- the interim minister is accountable to his/her peers, through the Conference Interim Ministry Committee.

Position Descriptions
for
Lay Employees

Lay Employees – General Guidelines

Includes: Church Secretaries
Administrators
Musicians and Choir Directors
Custodial staff
Youth Workers (if under 8 hours per week)
CE Workers (if under 8 hours per week) – and others

Remember:

There are many categories of lay employees, including support staff and those performing the roles of ministry personnel. The onus is on local churches to be fair in their employment practices, and to be familiar with provincial Employment Standards. (See these essential and helpful resources: 'Employment Guidelines for lay employees in pastoral charges and other church-related organizations' prepared by the General Council Human Resources Committee of The United Church of Canada and the 'Financial Handbook for Congregations'. Both are available on the UCC web-site and through UCRD.

This section refers to personnel in positions that are mainly non-ministerial in terms of function, and for which lay personnel are clearly recruited. These positions do not require presbytery approval, but are still managed and overseen by the M&P Committee. If they are Congregational Accountable Ministry positions (under 8 hours), the Pastoral Charge must consult with the presbytery prior to making the appointment. (041.1)

It is important to note that the definition of "ministerial" and "non-ministerial" is a matter for discussion in the United Church. There are some grey areas. Consult your presbytery or Toronto Conference for assistance.

The 14-hour rule:

All positions in local pastoral charges, whether lay or ministry personnel, that are 14 hours or more per week, must be enrolled in the United Church pension plan. Core group insurance must be provided as well. Further optional coverage for health and dental, is at the discretion of the individual employee. The Church wants to be a fair and just employer; the administration of the pension plan for lay employees is an important aspect of this. Please make sure that your lay employees are enrolled in the plan.

Accountability

All employees are accountable to the Official Board of the pastoral charge, through the M&P Committee. While churches have the flexibility to develop unique Board or Council structures, the role and function of the M&P Committee is not flexible. Every pastoral charge must have a functioning M&P Committee for its staff. (189, 211, 226, 244)

The M&P Committee ensures that position descriptions are prepared and updated for lay employees, conducts regular performance reviews, and recommends salary and benefits to the Official Board (or equivalent). Remember: The M&P Committee recommends; Boards make decisions based on those recommendations. This is the primary line of accountability in the local church structure for lay employees.

Some pastoral charges have property committees for custodians or worship/ music committees to which musicians relate. Such structures can provide a natural working arrangement for administering the ongoing day-to-day work and some employees may take direction from these committees for their work; such understandings are common in many pastoral charges. However, the supervision of the employee, and any grievances or conflicts, must be administered through the M&P Committee, which will consult with other groups, as necessary.

Frequently asked question: Is the minister to supervise lay employees?

No. The minister is accountable to the Board through the M&P Committee in the same way as the lay personnel. Ministers will often have ongoing day-to-day responsibilities on site, for example, involvement with and oversight of the church office, but there is no direct supervisory role.

Accountability on Multi-point Charges

Pastoral charges with more than one congregation often find themselves with various organists, secretaries, custodians, etc. Such a structure can be complicated when local Board structures allow for autonomy, with a Central Board that meets infrequently, maybe only once per year.

However, there is only one M&P Committee per pastoral charge. It should have representation from each point on the charge. There is the flexibility to develop subsets of M&P in each point, in order to support and administer lay personnel. However, the administration (support, goal setting, evaluation, etc.) of ministry personnel must be the responsibility of the full committee, and the Official Board (or equivalent) is still the decision-making body in all cases.

Beyond this general guideline, apply to your presbytery for approval of other configurations or arrangements that suit your situation.

Paid Volunteers

Paid volunteers are lay people who perform a specific task for pastoral charge, without official remuneration. They may have a job description (a good practice for volunteer management); they may receive an honorarium for their services. However, such positions are not staff positions. They do not require supervision by the M&P committee, being directly accountable to the Official Board. Such accountability should be stated in whatever agreement is made. (Risk assessment and screening procedures need to apply to such positions. See “Faithful Footsteps”.)

One example: a pastoral charge may have a treasurer who receives \$500 per year as a token of appreciation. This person is accountable to the Board directly, even though the M&P Committee may be involved in the development of the job description. People often ask: “What if the paid volunteer does not perform the job well? How do we let them go?” Because they are accountable to the Board, a simple Board motion will suffice. There are no legal ramifications of letting a volunteer go, though there may be pastoral ramifications to which attention needs to be given.

(Tax note: Remember that honoraria are taxable income.)

Hiring Members of the Congregation for Lay Positions

Please note that the church cannot discriminate for or against congregational members in the hiring process. However, experience has shown that, particularly in cases where discipline, or even termination, is required, these processes are easier to administer when the employee is not a member of the pastoral charge.

Another critical factor to bear in mind in many lay positions is the issue of confidentiality. Make sure, when hiring, that the expectations in the area of confidentiality are clearly stated and understood. Better yet, put them right in the job description!

Apply the processes of risk assessment and screening to the position description, so that such processes are respected even if the person is well known.

Guidelines for Benefits: Lay Employees

Remember:

These are guidelines for M&P Committees.

The United Church does not regulate this area outside of the Employment Standards of Ontario. The onus is on local churches to be fair and just in their employment practices, as befits a religious organization.

Remember: Essential and helpful information can be found in "Employment Guidelines for lay employees..." and the "Financial Handbook for Congregations", available from the UCC web-site..

Holidays

Statutory holidays, if work days, are paid days off. (Most pastoral charges which require lay staff to work on statutory holidays, for example, a custodian required to work Good Friday, offer a paid day off in lieu of the statutory holiday.)

Vacation

- Vacation should always be negotiated through the M&P Committee, and may include consultation with the ministerial staff.
- Provincial Employment Standards provide guidelines for employees' annual vacation with pay that include minimum entitlements. (In most provinces, for every 12 months worked, employees receive a minimum of 2 weeks paid vacation).
- For contract employees working less than 12 months (or for any period during which an employee has not earned a vacation with pay) staff receive a minimum 4% vacation pay.
- Most churches reward staff with years of service with extra paid vacation. If such an agreement is not in the original job description or contract, it should be negotiated and added to it. A helpful note here: the extra vacation time policy should be the same for each lay employee. (Vacation benefits for ministers are administered differently.)

Sick Leave

While not official policy, most churches offer the standard one day per month for sick leave, which may be 'banked' to a total of 12 per year. (Pastoral charges could decide to be more generous at their discretion.)

Banking of sick time beyond any 12-month period is not recommended, especially since the short-term disability plan (lay employees) will become effective if a person needs a longer period at one time.

Absence from work for more than 5 working days normally requires a medical certificate.

Bereavement leave

The usual policy for bereavement leave is for four paid days off, with time for travel if necessary. More time may be negotiated with the M&P Committee, and at the Committee's discretion, it may be paid or unpaid leave.

Compassionate Leave

Personal emergencies can happen to anyone. Any leave beyond a few days off work for compassionate reasons should be negotiated with the M&P Committee. The Board should approve a longer leave and be clear about the terms of the leave, whether paid or unpaid, etc.

(In the area of compassionate and bereavement leaves, it can be helpful to refer to Section 36 (p) and 36(q) of *The Manual* for a reminder about the church's standards for ministry personnel.)

Unpaid Leave of Absence

Such leave must be negotiated with all parties. Usually, in the case of a long leave, the staff person will have in writing an assurance of re-employment, unless the employee has made an offer to terminate at the end of the unpaid leave.

Statutory Payroll Deductions

Canada Revenue Agency produces Payroll Deduction Booklets which, with up-to-date information on payroll deductions, can be found at:
www.cra-arc.gc.ca/tax/business/topics/payroll/menu-e.html.

For information about payroll deductions for casual staff who work on a part-time, casual, or infrequent basis, see Section 4.2.2 of the "Financial Handbook for Congregations".

CRA provides some booklets to assist in determining payroll deductions. They are usually forwarded to employers every year; otherwise they may be obtained from District Taxation Offices or from CRA's web-site.

Participation in the Pension and Group Insurance Plans

For employees hired before January, 1989, both of these are optional, regardless of the number of hours per week.

Since 1989, any employee working 14 hours per week or more must be enrolled in the United Church pension plan, and the Core group insurance plan.

Members may opt for greater optional coverage at the time of enrollment, depending on their personal circumstances.

Disability

Lay members of the pension plan are eligible for weekly indemnity coverage during a period of extended illness. Contact the Department of Pensions and Group Insurance for guidance.

Work-related injuries may also be covered by Worker's Compensation, depending on the injury.

As opposed to the policy for ministerial personnel, there is no obligation upon pastoral charges to provide long-term disability insurance to lay employees. Staff may opt for this coverage through a private plan, but the premiums are high.

M&P Committees should periodically discuss these issues with their lay employees, perhaps as part of a work-review process.

Changing or Terminating Employment

Remember

Regardless of the hiring process, whether formal or informal, whether orally or in writing, the parties have entered into an employment contract. For this reason, appropriate job descriptions and regular work reviews are very important.

Once an individual has been hired by the employer, the employment contract between the parties is determined. The employee and the employer must then both live up to the bargain. Minor changes to the contract can usually be made by either party. The law allows for some flexibility.

However, major changes to a significant term or condition of the contract must be the subject of mutual agreement between both parties. Attempting to alter a fundamental term or condition materially, without such agreement, can lead to a breach of the original contract.

Transfers (lateral moves within the organization), promotions (increase in level of responsibility), and demotions (decrease in level of responsibility and/or pay), all require the mutual agreement of both parties. No employee can be compelled to accept such a significant change in the terms of original employment contract without consultation and agreement.

Terminations or Dismissals

Most contracts end with the employer serving reasonable notice that a contract will not be renewed or extended. The province regulates the minimum amount of time that constitutes reasonable notice. That time depends on the type and level of the position and the amount of time it might reasonably take to find similar employment elsewhere. Some employers opt to pay full salary and benefits in lieu of reasonable notice.

The main exception to the reasonable notice provision is termination for just cause. This relieves the employer of its obligation to give reasonable notice. Just cause occurs when the employee is in breach of the contract for very serious reasons. If challenged, the employer would have to provide appropriate grounds.

Some examples of just cause:

- theft
- violence or threats of violence
- repeated absences without explanation
- embezzlement of funds
- sexual assault
- insubordination (refusal to do work)
- negligent performance of job duties

If the subject matter of the termination is very serious, no previous warning is necessary. If the subject matter is work performance, or a less serious problem, prior warning is usually necessary to establish just cause. This warning should be clearly stated and in writing.

For helpful guidance on the topic of termination, with and without cause, see *'Employment Guidelines for lay employees...'*, pp. 26-33.

Wrongful Dismissal

Wrongful dismissal occurs when an employee is dismissed without just cause and without reasonable notice or pay in lieu of notice. When employees are wrongfully dismissed, they have a legal right to sue and claim damages for pay in lieu of notice. Please note that churches, as employers, are not exempt from this legislation.

Constructive Dismissal

When an employer unilaterally alters the terms and conditions of the employment contract, the employee may elect to quit and sue for constructive dismissal. Constructive dismissal means that the employer is in breach of the contract. A constructively dismissed employee has the same right to pay in lieu of notice as one dismissed without cause.

Pastoral charges entering into discussions with lay employees about changes to job descriptions or a reduction in the number of hours worked need to understand employment legislation. It is always prudent to talk to an employment lawyer before initiating such a discussion.

OUTLINE FOR A POSITION DESCRIPTION:
LAY PERSONNEL

Position Title:

General Description:

Provide a brief description of the position.
State purpose or main focus, general goal or mandate.

Working Hours:

State whether full time, salary or hourly.
State number of hours required in a regular work week.

Areas of Responsibility

Name the main functions individually, with a brief description of each.
Include the average number of hours for each function or state a percentage of time for each function.

Accountability

State clearly any and all reporting relationships.
Clarify the relationship to the M&P Committee.
State clearly the relationship to other employees of the church.
State how often the position and the person will be evaluated.

Requirements:

Status, if applicable.
Essential skills or training required.
Desired skills.
Personal characteristics desired (for example, strict confidentiality).

Working Conditions:

Salary or wage
Benefits
Increment policy
Office hours, if applicable
Vacation policy
Sick leave; other leaves
Other conditions

Sample Job Description: Lay Personnel

Position Title: Church Secretary

General Description:

The Church Secretary acts as the general office manager of the church office, assists the minister with secretarial/clerical work, and assists the congregation and its organizations with clerical and sometimes secretarial work.

Working Hours:

The normal work week is 20 hours (half-time).
Hours of work: Monday to Friday, from 9:00 am to 1:00 pm.

Areas of Responsibility:

- Preparing weekly Sunday bulletins and bulletins for special services
- Managing the office computer system
- Coordinating the purchase of office supplies
- Answering the telephone/ communicating with the minister
- General filing
- Maintaining the record books of the pastoral charge
- Greeting visitors to the church (during office hours)
- Booking rooms, as required

Accountability:

- Reports to the M&P Committee through the designated liaison person and, through M&P, to the Official Board
- Meets biweekly with the minister to establish work plans
- Conflicts/ grievances will first be dealt with in the M&P Committee, which may suggest follow-up procedures.
- Performance review: yearly, in June

Requirements for this position:

- Word processing proficiency; communications skills
- Knowledge of phone, copier, fax systems; record-keeping skills
- Accuracy in printed work is essential

Working Conditions:

Hourly wage: _____ per hour, payable on the 15th, 30th of each month

Benefits:

- participation in the United Church pension plan
- participation in the United Church group insurance plan
- paid holiday of two weeks per 12 month period
- additional unpaid holiday may be negotiated, as desired.

Sick leave:

- one working day per month; maximum 12 per year.
- (unused sick time does not carry over to next year)

Compassionate/bereavement leave:

In consultation with the M&P Committee / liaison person.

Overtime:

Paid at same rate, if negotiated with the M&P Committee in advance.

Continuing education:

Time off and pay for one course per year, if negotiated with the M&P Committee, and taken in the areas of responsibility.

Termination of Employment:

Unless dismissed for cause, two weeks notice will be given for termination of this contract, by either party.

No termination pay, beyond employment standards legislation, will be given at the end of employment.

(M&P Committee please note: The termination clause is very important and must be included)

Sample Contract for Use with Music Director

THIS AGREEMENT made this ____ day of _____ 20 __

BETWEEN:

The congregation of (Name- Pastoral Charge United Church),
Churchtown, Ontario

("Pastoral Charge")

and Music C. Player, Toronto, Ontario
Judicial District of

(the "Contracting Party")

WITNESSES that Pastoral Charge and the Contracting Party agree as follows:

1. TERMS OF THE AGREEMENT:

Pastoral charge agrees to engage the services of the Contracting Party upon the following terms and conditions:

- a. Effective date: This contract commences on June 1, 20--
- b. Term: This agreement is for a term of twelve (12) months.
- c. Renewal: This agreement may be renewed from time to time upon the same terms and conditions by written notice from Pastoral Charge except for payment terms, which shall be negotiated on an annual basis.
- d. Payment: Pastoral Charge agrees to pay the Contracting Party the sum of _____ dollars per annum to be paid monthly upon receipt of monthly invoices.
- e. Musical Year: 52 Sundays, minus the first Sunday after Christmas and Easter and four Sundays of the months of either July or August, will constitute a "Musical Year" of 46 Sunday Services.
- f. Duties: The Contracting Party agrees to perform the following:
 - i. Supply a Director of Music acceptable to Pastoral charge for a "Musical Year" including weekly rehearsals for the senior choir; appropriate regular rehearsals for the junior and youth choirs to present a minimum of four musical performances yearly.
 - ii. Assist the Worship Committee for Pastoral Charge in the overall planning of Worship services.
 - iii. Be responsible through key security for the church organ and choir area(s).
 - iv. Recommend on an annual basis to the Worship Committee of Pastoral Charge an expense budget for music arrangements and instrument (piano and organ) maintenance and repair.
 - v. Organize and present with the choir(s) a special musical performance during the season of Advent and during the season of Lent, in cooperation with the Worship Committee, the Minister(s) of Pastoral Charge and the Executive Committee of the Senior Choir.

- vi. Supply a substitute organist, when required, at the expense of the Contracting Party at the following rates:
 - Sunday Service (no rehearsal) \$____.00
 - Sunday Service (with rehearsal) \$____.00
- vii. Provide music direction for wedding and wedding rehearsal when required. Fees for these services are to be invoiced separately as set out in the "Wedding Fee Package" of Pastoral Charge.
- viii. Invoice Pastoral Charge for additional out-of-pocket expenses not to exceed \$- dollars per annum.

CANCELLATION:

This agreement may be cancelled by either party upon sixty (60) full days notice in writing sent by ordinary mail addressed to:

for Pastoral Charge: Pastoral Charge United Church 15 Church Street
Churchtown, Ontario
XOX OYO
Attention: Chairperson of the Board

for Contracting Party Music C. Player
1234 Melody Street
Toronto, Ontario
M8M 2Z2

Notice is considered to have been received five (5) days after mailing.

To evidence this Agreement, Pastoral Charge and the Contracting Party have signed it at Toronto, Ontario, this _____ day of _____ 20 ____.

CONTRACTING PARTY _____

PASTORAL CHARGE UNITED CHURCH _____

**Performance Evaluations
and
Goal Setting – Assistance
for
M and P Committees
and
All Staff**

Performance Review and Evaluation Process

Remember

- *All people are called to minister.*
- *All – ordered and non-ordered personnel and laity– are called to be partners in ministry.*
- *Ministering to others is not optional for anyone in the church.*
Reviews and evaluations within the context of the church are different from those in other settings. Because we understand that ministry is done in a community of faith, the church's relationships with its 'employees' is unique.
- *Every congregation is different.*
- *Every congregation experiences unique successes and failures. Comparison between churches and ministries is difficult.*
- *That is why church-based evaluations and reviews need to measure performance in light of the mission and ministry goals of the church and of our faith.*

(See also 'Annual Review Model' in 'A Handbook for Ministry & Personnel Committees, p.28 – Appendix C. You may wish to discuss how it fits your setting and what changes you would propose. Does the rhythm for meetings, the review process and the setting of goals suggested in Appendix B meet your needs?)

Evaluating the Ministry of the Church

Remember:

- *Each congregation has a unique mission.*
- *Each congregation has a unique context for ministry*
- *Each congregation is a community of faith.*

Step One: The mission statement

Evaluate the mission statement of the pastoral charge. If your charge doesn't have a mission statement, recommend to the Official Board that one be developed. You might ask questions such as:

- Who are we?
- What is our mission as a community of faith?
- What is the context in which we are called to do ministry?
- What needs do we identify in the congregation and the community?
- What are some realistic goals for us?
- What potential do we have?
- And: What is God calling us to do?

These are exciting questions. Reviewing them every year or two as part of the regular review process will help the congregation to focus on its mission and ministry.

Step Two: Goal setting

- Set goals that complement the mission statement of the congregation or pastoral charge. Do so in consultation, involving the M&P Committee, ministry or lay personnel and the Board or appropriate committees, depending on the goals (e.g. worship, Christian development/faith formation, church school, pastoral care, outreach, property, stewardship). But limit the goals to a few, achievable over a period such as a year.
- Then decide how to evaluate them.
- Evaluate against your stated mission, not in comparison with other pastoral charges.
- Don't attempt to evaluate without having first defined your mission.
- As a next step, goals may be turned into a work plan with assessment criteria to indicate what is hoped for. ONE EXAMPLE:

Mission statement: 'a community of faith for all ages'.

Goal statement: develop and provide worship that involves young people.

Work plan: work with the Music, Worship and CD committees to plan and offer worship that will involve young people in leadership and participation.

Assessment Criteria: Between September and June, the congregation will offer two 'new' services at alternative times, and one during Sunday morning worship, with music and format to appeal to young adults and including leadership and participation by younger members of the congregation. Youth will help plan these services.

Remember:

The responsibility of the M&P Committee is to help the congregation evaluate its ministry. If you are starting from scratch, have the Board or Council set up a separate task group for the mission statement work, so that your energies may be spent elsewhere.

Step Three: Select tools for evaluation

Select appropriate tools for evaluating the total ministry.

- Statistical analysis is sometimes appropriate.
- Random sampling of the congregation: i.e. a survey sent to every third member may be helpful.
- Random sampling in the community may be worthwhile, although perhaps more so for setting out a mission statement and goals than for evaluation.
- Surveys after worship (a widely used method). You might ask questions such as:
 - What are the strengths and weaknesses of this congregation?
 - What would you like the congregation to focus on next year?
 - What is a realistic goal for this congregation for the next 5 years?
 - Other than today's, what worship experience stands out in your mind?

- How did you first come to this church?
- (Include mission statement) How could the congregation better accomplish its mission?
- Are there needs in the congregation, or in the community, we are missing?
- Interviews with individuals
 - with the Official Board
 - with each staff member
 - with a cross-section of people
- Focus-group approach
- Gather groups after church or during the week to answer the survey questions in a group format.
- Evaluate specific programs every other year.
 - You might highlight and evaluate the music program, for example, one year, then focus on the Christian education or pastoral visiting program the next year.

Step Four: Evaluate the Ministry of the Congregation

These questions might be part of a general survey sent to church members. The first year you might want to survey the whole congregation. In subsequent years, a random sample might work.

These would also be useful as starter questions for after-church focus groups.

In the Church:

- How does my involvement in the congregation match my gifts?
- How does what I do serve to build up the body of Christ?
- Are there needs in the church that are not being met?
- Are there ministry opportunities for me?

In the workplace:

- What, in my job/ professional life, could be viewed as a ministry to others?
- How does my job description reflect opportunities to minister to others?
- Do I need to "reframe", at least in my own mind, some of those tasks?
- Is there anything in my job that comes into conflict with my own set of values, or with my Christian calling?

In the community

- How meaningful to me is the community in which I live?
- Are there opportunities to minister to others that I am missing? That our congregation is missing?
- What fears do I have about ministering to my community?
- What do I need from my church in order to overcome my fears?

Step Five: Evaluate the Lay Staff and the Ministry Staff

Here's a general outline for accomplishing this task.

In September

- Gather staff together to discuss the process you will use
- Discuss together the goals of the congregation
- Review individually with staff their personal goals for the upcoming year.
- How do their personal goals coincide with the goals of the congregation?
- Discern together what goals will be worked on. How will a work plan help?

In May-June

- Gather staff together to talk about the previous year
- Review with the staff team the results from congregational surveys, etc.
- Meet with individual staff to evaluate the previous year's work.
- What went well? What went less well?
- Are there any work-related concerns that need to be addressed?
- Are there interpersonal relationships that need to be discussed?
- Begin to set new goals for the coming year, for review in September.

September: Start the process all over again!

NOTE:

- **During the year, does the M&P Committee meet with staff to build community, relationships and trust?**
- **Social gatherings help to broaden the base of knowledge and respect for the various persons involved.**
- **Work reviews and performance evaluations are important work for the M&P committee, but are complicated tasks when the level of trust is low.**
- **Start slowly.**

Performance Review and Evaluation

FOR Ministry Personnel

Remember:

Given that each position description is different, these samples are intended primarily as resource material for M&P Committees. Please adapt to your needs.

General Comments

Performance reviews or evaluations provide a basis for individual and organizational development. They are a helpful resource for personal and corporate planning strategies, and form an integral part of a pastoral charge's personnel policy. These reviews are intended to open up a dialogue about strengths and weaknesses, not only of the employee, but also of the pastoral charge. Only through mutual trust and dialogue, can an organization be empowered to move forward.

Some personnel are not accustomed to or comfortable with performance-evaluation processes. However, once a process is in place, and as everyone becomes more familiar with it, the merits will become evident. Sometimes ministers may confuse this review process with a Presbytery-driven disciplinary review process, which raises the anxiety level, not to mention one's blood pressure! The best way to lower anxiety is to ask for input from ministry personnel at every step of the way. Ask:

- What process should we use?
- What would be most helpful to you? To other staff?
- From whom will responses be invited?
- How will the results be used?
- How will goals be set, and monitored?
- How will we measure improvement?

These are important issues to address BEFORE beginning the process!

Strategies:

- Performance reviews must be tied to the position description including the categories of responsibility and accountability in that document and to goals that have been set and agreed upon.
- Use the mission statement and the position description to set goals: Link mission and goals. Try not to overload a minister with too many goals. No one can do everything, though some will try! (*That's not helpful for anyone!*)
- Share the results with ministry personnel before sharing with the full committee.
- Have the ministry personnel complete a self evaluation as well.
- Focus on improvement, not criticism.
- Ask: "How can we help you?"
- Examine: How can the *congregation* improve in this area of concern?

- Do not compare one staff person with another or the ministry in one pastoral charge with that in another.
- For team ministries, it might be helpful to evaluate individuals at different times of the year, and to do a "team" evaluation at yet another time. This maintains the distinction between individuals and their performance, yet still honours the team.

Salary and Benefits

Increases to salary and benefits do not have to be based on merit. The United Church mandates a percentage increase in the minimum salary structure for ministry personnel, every year. It would be a good practice to make this your minimum increase, and top up as you measure performance. The difference between the financial year (usually Jan. 1 to Dec. 31) and the pastoral year (July 1 to June 30) may make it more difficult to link salary and reviews explicitly, unless people understand clearly the rhythm of the evaluation process, discussed above.

- Increases to benefits are not easy to administer.
- Housing should not be increased beyond fair market value. Doing so may cause problems with taxation and pensionable earnings (see page 5).
- Travel is set at a standard minimum rate by General Council (36 cents per km. in 2005) It is difficult to justify an increase in this area, unless the amount of driving changes.
- The allowance for study - books and continuing education - may be increased.
- Vacation time may be increased, but it is difficult to reduce this benefit later.

Remember

Before making salary recommendations to the Official Board/Council, make sure you meet with ministry personnel first, and discuss the reasons and implications.

Downsizing:

To cut salary, benefits or time is a difficult process, one with legal implications. The Church has a strict policy in this regard. Sections 50-52 of *The Manual* address the issue and require that the Presbytery conduct a needs assessment to determine the ministry needs of the pastoral charge before any decision can be made. Reducing a position, or changing the job somehow in a way that would change the employment contract (or call), may lead to constructive dismissal.

The pastoral charge always has the right to invite the Presbytery to conduct a special congregational meeting, if there is a need to talk about pastoral relations. Only such a meeting can address the question of the pastoral relationship.

In any termination of contract or call agreement, the Presbytery **MUST** be involved.

Reasonable notice is considered to be 90 days, full salary and benefits.

When questions pertaining to the pastoral relationship arise, a pastoral charge would be well advised to invite the advice of a Presbytery Pastoral Relations person, the Conference Minister for Personnel Policy and Support, and/or legal counsel, to reduce exposure to litigation.

Timetable:

As with lay personnel, goal setting is best done in late spring (after Easter!) or early September: At the former time, programs and initiatives are usually accomplished and the results can influence and help formulate new goals, and in the latter period, the year is fresh, and ideas and energies are flowing (though people may become too busy, too fast, in September, to devote the amount of time needed for the process).

Complete the performance reviews at a similar time, probably mid-spring, and after Easter. Tying the process too closely to salary negotiation invites distrust of the process.

During a Disability

Do NOT conduct a performance evaluation process during a period of short or long-term disability. To do so is contrary to human rights legislation.

You may, if a person is back to work part-time, do some goal-setting exercises.

GOAL SETTING FOR MINISTRY PERSONNEL

Position: Minister of Worship and Pastoral Care

Date:

M&P rep:

Number of years in this position:

Number of hours per week:

Areas of Responsibility

1) Preaching and Worship

Goals in this area:

To complete seasonal planning in the summer, before the busy fall program begins.

To encourage participation by youth in worship.

Needs in order to achieve:

Some unscheduled time in August to complete planning; meet with other staff to coordinate special service plans.

Planning and help to recruit, encourage and train young people to plan and participate in special services.

2) Pastoral Care:

Goal(s) in this area: etc.

Discussed with M&P committee _____

Review date for these goals _____

Signed: _____
(Minister)

(M&P liaison)

AREAS OF MINISTRY and POSSIBLE GOALS

Remember:

- *No one can do everything.*
- *Pick **one or two** achievable goals from each area selected; set related actions by which progress toward the goals may be assessed.*
- *Get others to work on other goals of the congregation.*
- *Be kind to yourself by focusing on what's agreed to be important at this point to ministry personnel and congregation.*

1) Preaching and Worship

Possible goals:

- plan worship services two months in advance
- develop special worship themes (for Advent or Lent, for example)
- strive for variety in preaching techniques
- make worship services more (...select an appropriate word) in nature
- work more closely with music director to choose music for worship
- work more closely with the worship committee
- provide more opportunities for education about worship
- involve the laity more / hold a lay training event
- work on a new membership policy
- focus more on (...select an appropriate word) in preaching
- work with interested parties to plan three youth-oriented services over the coming year
- etc.

2) Pastoral Care

Possible Goals:

- schedule visits of shut-ins more regularly
- train lay people to do visitation; develop a pastoral care team
- take a course in hospital visiting
- establish a priority visitation list
- visit in the community
- etc.

3) Administration

Possible goals:

- take a time-management course
- develop more organizational skills
- upgrade computer skills
- establish office hours and communicate them
- plan a retreat for the Official Board
- set up a special stewardship committee to plan and implement the annual campaign
- work with the Board to contract with a consultant to analyze and make suggestions about congregational structure
- train people how to run meetings effectively
- eldership training day/ leadership training day

4) Education:

Possible goals:

- monthly planning/ seasonal planning with Church school leaders
- work with another congregation (or presbytery) to train teachers together
- have an "awareness" month once this year, e.g.) AIDS, poverty, Decade to Overcome Violence, racism. etc.
- train lay leaders for Bible Study
- work with the Board to find leaders for the youth group
- seek out continuing education resources for lay people
- start a family camp /summer vacation school for the community

5) Community Outreach

Possible goals:

- work with the ministerial to help with local initiatives
- work with other congregations to develop strategies for community outreach (e.g. Out of the Cold)
- find people to start a community sports program
- work with Board to survey the community for its needs
- train people to help with hospital and nursing-home services
- investigate Habitat for Humanity
- etc.

6) *Presbytery and Conference work*

Possible goals:

- become less involved
- become more involved
- serve on only one committee this season
- attend Conference AGM; encourage youth to attend programs
- network with other ministers for mutual support and encouragement
- participate, with lay people, in Presbytery events
- etc.

7) *Study Time and Spiritual Growth*

Possible Goals:

- take one full day off per week
- spend more time on weekends with family
- read a book a month
- take a course in _____
- attend an annual seminar or national / international ministry event
- take full vacation time
- go for a walk everyday
- spend daily time in prayer and meditation

Performance Review and Evaluation

FOR Lay Personnel

Remember:

In the absence of guidelines or prescribed formats for this task (which is part of the mandate of the M&P committee), the following samples are intended primarily as resource material. You may add or subtract as you wish.

General Comments

Performance reviews or evaluations provide a basis for organizational and individual development. They are a helpful resource for personnel, and congregational planning strategies, and form an integral part of a pastoral charge's personnel policy. Such reviews are intended to focus on a discussion of strengths and weaknesses, not only of the employee, but also of the employing unit. Only through mutual dialogue and trust will an organization be able to move forward in a positive way.

Lay employees are often supervised by one of the committees on a pastoral charge. For example, the custodial staff sometimes report to the property committee for direction in terms of actual day-to-day tasks. However, the responsibility for the employee, in terms of salary negotiation, grievances, and performance issues, rests solely with the M&P Committee. Churches need to be clear about these supervisory roles.

Salary Increments

Most secular organizations tie salary increments to job performance or length of service. In pastoral charges, this recommendation lies with the M&P committee. Generally speaking, performance reviews are one part of a salary-review process, but they are not the only part. You will need to consider:

- budgetary constraints
- whether the minimum increase for ministry personnel applies across your full staff complement
- length of service
- need for special 'catch-up' or recognition

Tips:

- Performance reviews should be annual, in order to establish a pattern of discussion and evaluation with the staff.
- Performance reviews need to be shared with the employee if they are to form part of the salary-negotiation process.
- Decide on which tool(s) you will use to evaluate performance. You may wish to interview others with whom the person works closely
- Have each staff person complete a self evaluation as well.
- Focus on improvement, not criticism.
- Base your questions on the goals that have been set. Measure performance against the achievement of these goals.
- The review should follow the categories of responsibility that are in the actual job description.
- Do not compare one staff person with another.

Timetable:

Evaluations / reviews are best done in late spring. This is the best time for goal setting and goal review, since goals are either being established, as in September, or are close to being completed, as in late spring.

Do salary reviews separately, in late fall, or January, when budgets are being prepared. Staff people understand that the two are linked, but doing them at different times of the year helps to ease the anxiety. It also allows evaluation to occur on the basis of the pastoral year (July 1 – June 30), rather than the financial year (Jan. 1 – Dec. 31). People need to understand the criteria being used for salary recommendations.

Downsizing

To reduce staff positions, in terms of time, or to cut a position completely, requires adherence to the Employment Standards of Ontario.

Generally, positions are reduced or eliminated due to budget constraints, or to restructuring of the organization. The law requires that reasonable notice be given to an employee (see below); or, in lieu of notice, the same amount of pay and benefits.

- employees who have worked more than 3 months, but less than 12, are entitled to one week's notice
- employees who have worked more than one year, are entitled to a minimum of two week's notice
- employees who have worked more than 3 years, are entitled to one week's notice for each year of employment, up to a maximum of 8 weeks.

Re-designing job descriptions, cutting pay (demotions), or other breach of the original employment contract leads to what is known as constructive dismissal. In these cases, employees are entitled to the same benefits as they would be with reasonable notice. Any unilateral cutting or eliminating can lead to litigation, unless there is just cause for dismissal.

Just cause includes:

- short-term contracts less than 12 months in duration
- willful misconduct or willful neglect of duty
- retirement age
- insubordination
- theft, violence, etc.

It should be stressed, that, when a pastoral charge is considering reducing or eliminating any lay employee's position, the advice of an employment lawyer should be sought.

Sample Goal Setting Exercise – Lay Employee

Position: Church Secretary

Date:

M&P rep:

Number of years (or months) in this position:

Number of hours per week:

Areas of Responsibility

- 1) *Preparing weekly bulletins, and special service bulletins*

Goal in this area:

I intend to have the Sunday bulletin completed by the end of the work day on Thursday, each week, if possible.

Needs in order to achieve:

To practice some time-management techniques.

- 2) *Managing the office computer system.*

Goal in this area:

To become more familiar with Microsoft Office package

Needs in order to achieve

To take a one-day course in this area

etc. etc. etc.

Discussed with M&P committee on: _____

Expected review date on these goals (and others which may arise):

Signed: _____
(employee)

(M&P liaison)

(sample performance review/evaluation form)

Performance Evaluation and Development Plan

(St. - Name -) United Church

Name: _____

Position: _____

Number of Hours per week: _____

Number of years of service _____

Contract (or call) start date: _____

A Position Responsibilities

In each section, indicate key areas of responsibility from the job description. Ask those assisting in the review to choose areas of responsibility in which they have experienced the person's performance and to comment on achievements and celebrations, as well as potential areas of concern. (For a self evaluation, ask people to comment on their own achievements and celebrations, as well as any concerns over the period since the last review.) In each case state the goal(s) that were established during the last review process, and how much of that goal was achieved, in your opinion. If possible, mention potential goals for the next period.

For your own reference, list the position responsibilities here:

A-1	Responsibility:	Preaching and Worship
General Comments on performance:		
Goals from last year:		
How well achieved:		
Possible goals for next period in this area of work:		

A-2	Responsibility:	Pastoral Care
General Comments on performance:		
Goals from last year:		
How well achieved:		
Possible goals for next period in this area of work:		

A-3

A-4

A-5

and so on through the areas of responsibility from the position description

Other Capabilities:	
B	<p>Some functions are less clearly related to the actual position description, but nevertheless, are important factors in performance. In these areas, indicate successes and any concerns, and then make possible suggestions for future growth.</p>

B-1 Communication Skills:	
	<p>General Comments:</p> <p>Suggestions for future in this area:</p>

Other possibilities:

- B-2 Relationships with Others
- B-3 Organization Skills and/or Time Management skills
- B-4 Resourcefulness/Initiative
- B-5 Leadership skills
- B-6 Commitment to the Organization
- B-7 Other: as appropriate to the position

