



# SURFACE TO SOUL

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## Tips for Conducting Annual Reviews

Annual reviews are designed to bring out God's best in an individual and to position them for maximum impact on ministry. It's a time to celebrate one's gifts and contributions, to make note of what has helped or hindered their impact, and to make course corrections in their goals, roles, and behaviors. Effective staff reviews focus on both the past and the future and pay close attention to how a staff member can increase his or her positive impact on the organization and its mission. In most cases, there should be few, if any, surprises for the staff person assuming that essential feedback has been shared throughout the year.

### SPECIFIC PURPOSES OF AN ANNUAL REVIEW

- Affirm a staff member's contributions to the church's mission and ministry.
- To review a staff member's performance in light of their goals and job description.
- To review a staff member's overall physical, emotional, social, and spiritual well-being.
- To review a staff member's conduct in light of your church's covenant.
- To review a staff member's conduct and performance in light of feedback from staff/members.
- To review and update the staff member's current job description.
- To share unmet expectations among all parties and how and when they'll be addressed.
- To name action steps and timelines for making shifts in roles, responsibilities, attitudes, and behaviors.
- To discuss what needs greater focus and energy for the upcoming year.
- To set quarterly and annual goals for the upcoming year.
- To schedule future "check-in" times with staff before the next scheduled annual review.

### PREPARING TO FACILITATE AN ANNUAL REVIEW

- Determine which assessment, reflection, and review forms will be used for the annual review.
- Determine who will conduct the review for each staff person and when each review will be held.
- Determine what information will be gathered from staff/members and who will gather it.
- Summarize staff/member feedback - compile a report or prepare a list of talking points.
- Discuss feedback gathered about a staff member; decide what will be shared at the review.
- Plan the flow of the review process – determine who will lead each phase of the review.
- Review the staff member's job description; list notes about potential modifications to it.
- Obtain copies of the staff member's completed Annual Review and Reflection Form.

### FACILITATING AN ANNUAL REVIEW & FOLLOWING UP AFTER THE REVIEW

- Make introductions to one another as needed; review the purposes for conducting a review.
- Invite the staff member to share key elements points from their completed Annual Review Form.
- Invite Review Team members to share their notes based on the Annual Review Form.
- Share feedback received from staff/members and the implications on a staff member's behavior.
- Discuss potential changes to the staff person's job description.
- Determine follow up actions. List dates when they will be reviewed and with whom.
- Schedule follow-up meeting dates if appropriate; decide who will be present at this meeting.
- Ask the staff member to sign the Review Form (now or within a week).
- Close in prayer of affirmation and ongoing discernment.
- Archive the person's signed Annual Review information; store in a secure location.



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