

# Ministry and Personnel (M&P) Committee Guidelines

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The United Church of Canada  
L'Église Unie du Canada

## Ministry and Personnel (M&P) Committee Guidelines



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# What's new in this edition

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- **Streamlined to remove inconsistencies and redundancies**
- **Policies and unit names updated**
- **New appendixes added**

# 1. Welcome

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By agreeing to become a member of the Ministry and Personnel (M&P) Committee in your church, you have taken on an important task.

Your involvement in this committee is a ministry in itself. You have probably been chosen because you have a good knowledge of the pastoral charge and are a caring member of the church. You may also have specific skills that are valuable for the work of this committee, for example, skills in human relationships, organization, or communication.

We hope you will find serving on the M&P Committee a rewarding experience.

## Why have Ministry and Personnel Committees?

M&P Committees are mandatory committees required by the by-laws of The United Church of Canada under every model of church governance: official board (*The Manual*, section 189), church board (section 211), and church council (section 226).

## What is the function of the Ministry and Personnel Committee?

In the United Church, we describe ourselves as “being in ministry together,” recognizing that the work of paid ministry personnel\* is only part of the ministry that takes place in the pastoral charge. The M&P Committee oversees relationships within the pastoral charge ministry, particularly the roles and functions of paid leaders and employees (such as the office secretary and any custodial staff). The M&P Committee may also be involved in setting expectations for work carried out by volunteers.

The M&P Committee has a dual role: it is consultative and supportive. This handbook aims to help M&P Committees clarify their roles and build positive, trusting relationships.

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\* Ministry personnel may include any of the following: ordained, diaconal, designated lay minister, congregational designated minister, diaconal/ordained supply, candidate supply, student supply, minister-in-training Native ministry, intern supply.

## 2. What *The Manual* Requires

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The work of the Ministry and Personnel (M&P) Committee is described in *The Manual*, the by-laws of the United Church. *The Manual* sets basic minimum requirements, and the church provides resources to help the committee do this important work. The requirements set out in section 244 of *The Manual*, 2007, are as follows:

### **244** Ministry and Personnel Committee.

- (a) Meetings. The Committee shall meet and shall report to the Official Board or Church Board or Church Council quarterly or more often as circumstances warrant.
- (b) Membership. The Committee shall consist of not less than three (3) and not more than seven (7) members representative of the Pastoral Charge. Members of the staff of the Pastoral Charge, including the settled or appointed Ministry Personnel, shall not be members of this Committee. The Committee shall not replace the Joint Search Committee in the event of a change in the pastoral relationship or a Vacancy. (2007)
- (c) Duties. The Committee shall:
  - i. provide a consultative and supportive agency for the staff of the Pastoral Charge and for members and Adherents of the Congregation(s);
  - ii. review working conditions and remuneration for the staff of the Pastoral Charge and make appropriate recommendations to the Official Board or Church Board or Church Council;
  - iii. oversee the relationship of the staff of the Pastoral Charge to members of the Congregation(s) and others;
  - iv. oversee the relationship between and among different members of the staff of the Pastoral Charge with respect to their responsibilities and authority;
  - v. consult with all members of the staff of the Pastoral Charge about their plans for continuing education and ensure that those eligible avail themselves of the provisions for continuing education and that money and time are made available;
  - vi. review and evaluate annually the effectiveness of the staff of the Pastoral Charge as those persons and positions relate to the mission of the Pastoral Charge as defined by the Official Board or Church Board or Church Council;
  - vii. maintain close liaison with the Presbytery Pastoral Relations Committee;
  - viii. review regularly the responsibilities of all staff of the Pastoral Charge and revise position descriptions when required or requested; and
  - ix. receive from each Ministry Personnel settled in or appointed to the Pastoral Charge, a current vulnerable sector (level 2) police records check, at the expense of the Ministry Personnel, no later than the completion of each six- (6) year period of the pastoral relationship. (2007)

In the church board model of governance, special provision is made (in section 211) for electing additional members to the M&P Committee, with the authorization of the pastoral charge.

## 3. How a Ministry and Personnel Committee Functions

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### Where does the Ministry and Personnel Committee fit in the structure of a pastoral charge?

Every pastoral charge must have a Ministry and Personnel (M&P) Committee that is accountable to the official board (or equivalent). Like the Worship Committee or the Finance Committee, the M&P Committee is an ongoing, standing committee.

The M&P Committee does not have decision-making authority. It recommends particular actions to the official board (or equivalent) concerning staff, including ministry personnel. But the M&P Committee cannot, for example, promise salary increases or dismiss staff.

The role of the M&P Committee is different from that of a Joint Needs Assessment Committee, Joint Search Committee, or Transition Team, which all have presbytery accountability and their own specific mandates.

### How many members are on the Ministry and Personnel Committee?

The M&P Committee must have at least three and no more than seven members. In a multi-point pastoral charge, at least one member of the M&P Committee should come from each congregation in the charge.

### How are members of the Ministry and Personnel Committee chosen?

Every pastoral charge should agree on a clear, transparent process to carefully select and appoint members to committees, including to the M&P Committee. Such a process helps to develop trusting relationships between the pastoral charge and its ministry personnel and staff members. Those involved in nominations should consult with the M&P Committee to be aware of special skills and experience that are required for this committee.

An M&P Committee functions most effectively when its members have a variety of backgrounds and life experience, reflecting the diversity of the pastoral charge. Active involvement of committee members in the life of a congregation is crucial. Committee members should be prepared to consult widely to hear from the diverse voices in the pastoral charge.

It is helpful to include people with

- knowledge of United Church policies and practices
- good interpersonal and communication skills
- experience within the organization of the pastoral charge
- human resources or personnel training or experience
- conflict resolution skills

Ministry personnel and staff cannot be members of the M&P Committee, nor can their immediate family. In fact, anyone who is in a conflict of interest or may be perceived to be in a conflict of interest with anyone in a paid position in the pastoral charge should not be a member of the M&P Committee.

It is often the practice for ministry personnel and staff to propose one member to act as their liaison to the committee. This person must have the trust of the ministry personnel or staff members to whom he or she relates, but should see the role as one of liaison and communication, not advocacy. In any event, if ministry personnel or staff are asked to meet with the committee, they should be encouraged to bring a support person with them.

To prevent confusion and conflict of roles, the M&P Committee should have different members from those serving on the Executive, Joint Needs Assessment Committee, Joint Search Committee, or Transition Team. For the same reason, chairs of the church's official board (or equivalent), standing committee chairs, or other people in positions of authority should not serve on the M&P Committee. Members of the congregation who are currently involved in some kind of conflict in the pastoral charge should also not be appointed to the M&P Committee.

### **How are new committee members oriented?**

Care should be taken to orient new members to the work of the M&P Committee. Each member should receive a copy of this handbook, and the committee should make a point of reviewing it together. New members must attend a training workshop offered by presbytery or the Conference personnel minister. They should also receive

- an overview of the committee's work during the preceding year
- the agreements and understandings reached between ministry personnel and staff members and the pastoral charge
- the goals and objectives established by the official board (or equivalent) and the pastoral charge, and those of individual ministry personnel and staff
- the standards of confidentiality negotiated with committee members and ministry personnel and staff

### **What is the Ministry and Personnel Committee's term of office?**

The M&P Committee is usually elected at the annual meeting of the pastoral charge. The terms of individual members are established by the official board (or equivalent) in the same manner as the terms of other standing committees. In order that the membership of the M&P Committee change on a regular basis, it is recommended that, in consultation with the congregation(s), the official board (or equivalent) establish definite terms for each committee with a maximum length for each member. It can foster continuity and memory on the M&P Committee if some members' terms overlap. Consideration should also be given both to consistency and to bringing new energy and insights to the committee.

## **How often does the Ministry and Personnel Committee meet?**

*The Manual* provides that the M&P Committee meet at least once each quarter (every three months), with additional meetings scheduled as needed. The committee may choose to organize more frequent regular meetings.

## **Who should be notified of Ministry and Personnel Committee meetings?**

Members of the M&P Committee must be given ample notice of both regular and additional meetings. As well, although ministry personnel and staff are not committee members, they should be notified of all meetings and be invited to be present for at least part of regular meetings, with time set aside for conversation.

## **What records are kept by the Ministry and Personnel Committee?**

Best practices would suggest that records of the M&P Committee's meetings be kept that include details of the date and time of the meetings, who attended, and any actions taken or to be taken. Much of the meetings will be in camera, and so will not be recorded. The records of the meetings should be maintained in a secure location.

### ***i) M&P files***

A general file for the committee should be kept, containing public documents such as handbooks and resources, the mission statement of the pastoral charge, pastoral charge profiles from the previous Joint Search Committee process, position descriptions, *The Manual*, and so on.

### ***ii) Personnel files***

A separate, confidential file for each ministry personnel and staff person should be kept in a secure place accessible only by the M&P Committee. These files contain position descriptions, contracts, call or appointment forms for ministry personnel, remuneration records, records of continuing education, copies of annual reviews, and reports and recommendations brought to the official board (or equivalent).

Properly presented concerns or conflicts should also be documented. A paper trail should be kept in the personnel file, including the concern as presented, the goals set to deal with the concern, and whether those goals were met. Personnel records should not contain any record or document related to rumours, innuendoes, anonymous letters or complaints, or undocumented accusations.

Ministry personnel and staff have access to the entire contents of their own personnel file on request to the M&P Committee.

## **What happens at meetings of the Ministry and Personnel Committee?**

Each M&P Committee determines the particular style and agenda for its meetings. See Appendix B for a suggested schedule of meetings. Regular consultation with ministry personnel and staff members is also important.

The M&P Committee of the pastoral charge is the appropriate body for people to bring questions or concerns regarding church ministry personnel and staff and their work. It is also the initial place for ministry personnel and staff to share any concerns they may have. Each concern needs to be taken seriously and given careful consideration, and all parties concerned need to be consulted to determine what action, if any, to recommend.

In planning a meeting, the M&P Committee should consider the following:

- identify any matters of concern that need to be considered by the committee
- ensure that ministry personnel and staff are aware of upcoming meeting dates and agendas, and inquire whether there is anything they would like to add to the agenda
- meet in comfortable, informal surroundings that ensure privacy and enhance open, honest communication
- include time for prayer
- include time for conversation with some or all of the ministry personnel and staff
- communicate any appropriate information or feedback to ministry personnel and staff members during or as soon as possible after the meeting
- determine what information or recommendations need to be shared with the official board (or equivalent) or other groups or individuals
- maintain confidentiality as established by the M&P Committee (see more detail in section 4, Confidentiality and Accountability)

## **What are the responsibilities of the Ministry and Personnel Committee?**

The responsibilities of the M&P Committee are

- to support communication between the congregation and ministry personnel and staff, and communication between ministry personnel and staff members
- to review with ministry personnel and staff their salaries, allowances, benefits, and honoraria, and the working conditions of the pastoral charge, and to make appropriate recommendations to the official board (or equivalent) prior to the beginning of the regular budgeting process
- to clarify the responsibilities and lines of accountability of ministry personnel and staff, and to review with them their position descriptions
- to consult with ministry personnel and staff regarding continuing education plans and needs, and make recommendations to the official board (or equivalent) to ensure that time and money are made available
- to conduct an annual review of the effectiveness of all ministry personnel and staff, referring to the goals and objectives established by the official board (or equivalent) and in the joint needs assessment process, and to the pastoral charge mission statement

- to establish a regular system of communication with the Presbytery Pastoral Relations Committee, and become aware of the role of the Presbytery Oversight Committee
- to become familiar with resources available through the presbytery, Conference, and General Council to enhance the committee's effectiveness
- to educate the official board (or equivalent) and its committees as well as the congregation about the role of the M&P Committee
- to work to resolve conflict at the earliest possible stage

### **What does the Ministry and Personnel Committee report to the official board (or equivalent)?**

Regular (at least quarterly) reports to the official board (or equivalent) include

- meetings of the committee and any pressing issues that need to be brought to the attention of the official board (or equivalent)
- response to any specific work requested by the official board (or equivalent)
- goals and objectives of ministry personnel and staff as they relate to the mission statement and the goals and objectives of the pastoral charge
- continuing education plans and vacation schedules for all ministry personnel and staff
- wider church commitments of ministry personnel
- annual review processes, and matters arising from the annual review
- areas of concern regarding the job performance of ministry personnel and staff
- changes to ministry personnel and staff position descriptions that the committee recommends or has learned of
- recommendations on remuneration including salary, housing, and benefits; and terms of employment including working conditions

## 4. Confidentiality and Accountability

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Confidentiality and accountability are vital to the work of the Ministry and Personnel (M&P) Committee. The committee must work in a confidential manner, remembering that it is accountable to the official board (or equivalent) and in relationship with ministry personnel, staff, and the congregation.

There will be times when information must be shared with the official board (or equivalent). These include situations in which recommendations are made to the official board for action to be taken (e.g., disciplinary action), when there is potential that such action may need to be taken in the future, when there may be a risk to the congregation, or other scenarios at the discretion of the committee and as requested by the official board (or equivalent).

Open dialogue is essential between M&P Committee members and ministry personnel and staff. The committee must establish an environment of mutual trust where clear messages are given and received, and relationships are established to further the church's ministry and mission.

It is important for committee processes to be clearly understood by all parties. For example, the M&P Committee should establish a clear process for annual reviews and for planning of vacations and other leaves.

The M&P Committee should develop and publicize a process for handling complaints or concerns, so that the congregation knows how to raise concerns appropriately, with specific details that will allow reasonable action. The committee must be very clear that it will not consider undocumented allegations, anonymous complaints, or rumours.

Standards for confidentiality should be agreed upon by the M&P Committee and ministry personnel and staff members, and be shared with the official board (or equivalent) and the congregation. It is important to be clear about what can and cannot be shared beyond the committee.

Any matter that is brought to the M&P Committee in confidence by ministry personnel, staff, or a member of the congregation must be kept in confidence (i.e., not told to anyone). For example, a letter of complaint might be written by a member of the congregation, with concerns about the minister's sermon or the choice of a hymn. This letter must be discussed only in the M&P Committee meeting, not outside of it.

In this case, the committee would decide what action to take on the letter of complaint: whether to call the letter writer in for more information, write a letter in response, or offer a mediated conversation between the person and the minister. However, no member of the committee should approach the letter writer with a private opinion about the contents of the letter.

Members of the M&P Committee would be allowed to talk to the person about other matters, but they should not speak about the letter outside of their committee meetings. If approached, they can reply that there will be a response from the M&P Committee in the near future, but they should not converse about the substance of the complaint.

When the M&P Committee recommends an action, it should inform those directly involved—for example, ministry personnel, staff, official board (or equivalent), other church committee, or individuals—but not publish the news more widely than necessary.

Concerns for confidentiality and protection of personal privacy need to be balanced by concerns for accountability. Minutes of M&P Committee meetings do not need to be extensive, but they should include

- a summary of the committee's discussions, with enough detail to support any actions or recommendations
- actions to be taken, and by whom
- recommendations to go to the official board (or equivalent), including recommended changes to position descriptions or recommendations about performance requiring response from ministry personnel and staff

Before M&P Committee reports go to the official board (or equivalent), the committee should consult with the ministry personnel and staff affected. There may be occasions when matters are reported by the M&P Committee without the ministry personnel's or staff's agreement on content. But this should happen only after the committee has tried to develop a consensus on the issue, and has given prior notice to the ministry personnel and staff involved.

All recommendations should be put in writing, and ministry personnel and staff must be offered the opportunity to respond, either in writing or in person. These written records are kept in the confidential personnel file of the ministry personnel or staff concerned. A report with recommendations will be brought to the official board (or equivalent) for its consideration.

## 5. Roles of the Ministry and Personnel Committee

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Serving on a Ministry and Personnel (M&P) Committee requires balancing several roles: a consultative and supportive role, a human relations role, and a conflict management role.

### The Consultative and Supportive Role

*The Manual* assigns specific responsibilities to the M&P Committee. The committee's primary responsibility is to be "a consultative and supportive agency for the staff of the Pastoral Charge and for members and Adherents of the Congregation(s)" (*The Manual, 2007*, section 244 c.i).

The M&P Committee consults with ministry personnel and staff employed full-time or part-time in the pastoral charge and with the official board (or equivalent) on matters of compensation and salary recommendations. The committee also regularly reviews pastoral charge working conditions and makes appropriate recommendations to the official board (or equivalent).

The M&P Committee consults with ministry personnel and staff to ensure that those who are eligible avail themselves of the provisions for continuing education, and ensures that money and time for education/skills development are made available.

On behalf of the pastoral charge, the M&P Committee oversees the areas of accountability of the staff, and conducts annual performance reviews. The committee encourages the official board (or equivalent) to regularly update position descriptions.

The M&P Committee consults with ministry personnel, staff, and the congregation on matters concerning their welfare and interests, and oversees the relationships of the ministry personnel and staff with the members of the congregation. The committee might extend expressions of appreciation, such as dinners or lunch invitations, motions of thanks at annual meetings, flowers for a special occasion, or a recommendation for a salary increase that exceeds the minimum. It is also appropriate for the M&P Committee to ensure that ministry personnel are aware of sabbatical leaves, and to ensure that ministry personnel and staff are taking adequate time away for self-care.

The M&P Committee keeps itself and the official board (or equivalent) informed concerning current United Church personnel policies and procedures. It is not the committee's responsibility to create the mission strategy of the pastoral charge or the position descriptions. Rather, the committee's role is to continually monitor and review the effectiveness of staff in relation to the congregation's mission, to communicate to the official board (or equivalent) regarding working conditions, to make recommendations regarding salary and compensation to the official board (or equivalent), and to foster the development of an effective ministry team.

## The Human Relations Role

The M&P Committee helps ministry personnel, staff, congregation members, and adherents build and maintain healthy relationships. The committee regularly meets with ministry personnel and staff to foster positive work relationships and an effective ministry team. Working in a pastoral charge can be challenging, as members of the congregation can have strong personal feelings of “ownership.” Although this is generally positive, it can have negative implications when ministry personnel and staff come to feel they have many “bosses.” Congregation members may have much input to offer about the work of ministry personnel and staff; ministry personnel and staff, in turn, may feel accountable to many voices in the pastoral charge.

The M&P Committee helps to ensure a climate in the congregation where constructive feedback can be offered and received in a positive way. Gossip, a reluctance to discuss issues in the appropriate place, or decisions made outside the decision-making structure of the pastoral charge can negatively affect working relationships. The M&P Committee ensures that when feedback is offered about work performance, it is done to allow for direct discussion, explanation, improvement, or change.

It is important for the M&P Committee to ensure that everyone in the congregation understands how issues can be raised. There must be a consistent, clear, and well-publicized process for appropriately raising concerns about the ministry personnel and staff. Ministry personnel, staff, and members of the congregation should know that this is the appropriate committee to talk to regarding effective ministry or working relationships in the pastoral charge. It is also the committee’s job to address situations when concerns are raised irresponsibly.

The M&P Committee can publicize its processes by

- having a workshop with the official board (or equivalent) about personnel issues and decision-making in the congregation
- making a presentation during a worship service or at a congregational meeting, or placing a notice in the bulletin or newsletter
- regularly reporting on the committee’s work to the official board (or equivalent)

## The Conflict Resolution Role

From time to time, conflict will arise. The M&P Committee supports healthy responses to issues, concerns, and conflict situations arising between ministry personnel, staff members, and the congregation.

The M&P Committee has a role in encouraging conflict resolution or, if necessary, mediation. When concerns are raised or conflicts identified, a process of hearing all sides fairly is essential. The M&P Committee can serve that need by having a confidential discussion of the legitimacy of the concerns. Ministry personnel and staff should be reminded that they may bring a support person with them to a meeting at which a concern about their performance is to be addressed.

In a situation of serious conflict, however, it is recommended that the M&P Committee consult early with the presbytery pastoral relations convenor and/or Conference personnel minister. Sections 65 to 72 of *The Manual* outline principles and procedures for the “resolution of conflicts.”

The M&P Committee also has a responsibility to ensure workplace health and safety. Staff should not be subjected to on-the-job harassment of any kind. The United Church is committed to providing a healthy and safe environment for all staff and congregations for worship, work, study, and participation in all pastoral charges, congregations, institutions, agencies, organizations, or other bodies that operate under its name. Complaints relating to any form of abuse, such as sexual abuse or child abuse, are subject to immediate action in accordance with United Church policies and procedures. For assistance concerning the specific process for complaints of sexual abuse or child abuse, the Conference personnel minister should be contacted immediately.

**Tools available:**

- position descriptions, the pastoral charge mission statement, and profiles from the joint needs assessment process
- presbytery pastoral relations convenors or chairpersons; Conference personnel ministers
- conflict resolution facilitators, available through each Conference
- *The Manual* ([www.united-church.ca/manual](http://www.united-church.ca/manual))
- see [www.united-church.ca/handbooks](http://www.united-church.ca/handbooks) for
  - *Guidelines for Developing Ministry Personnel Position Descriptions* [PDF: 7 pp/78 KB]
  - *Dispute Resolution Policy Handbook* [PDF: 29 pp/289 KB]
  - *Sexual Abuse Policy and Procedures* [PDF: 48 pp/242 KB]
  - *Ethical Standards and Standards of Practice for Ministry Personnel* [PDF: 8 pp/110 KB]
  - *Faithful Footsteps: Screening Procedures for Positions of Trust and Authority in the United Church of Canada* [PDF: 23 pp/363 KB]

## 6. Position Descriptions

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The Ministry and Personnel (M&P) Committee is responsible for ensuring that all ministry personnel and staff (and if possible, volunteers) have current, accurate position descriptions.

When there is a change in pastoral relationship, position descriptions for ministry personnel are developed by the Joint Needs Assessment Committee, in consultation with the M&P Committee and the official board (or equivalent). Subsequently, the M&P Committee assumes responsibility for reviewing position descriptions regularly and making recommendations to the official board (or equivalent) when revisions are required. This may occur as part of an annual review.

When there is a change in a pastoral relationship in multiple staff ministries, *The Manual* requires that clear position descriptions for all ministry personnel be developed and approved by presbytery.

Initial position descriptions for other staff may be developed, in consultation with the M&P Committee, by the committees that share in the staff member's oversight—for example, by the Property Committee for the caretaker and by the Music Committee and the Worship Committee for the musician. Consultation with ministry personnel and staff may also be appropriate.

Volunteer positions should also have written position descriptions. Descriptions for volunteer positions allow the M&P Committee to build in accountability for these positions, and to form a relationship with volunteer leaders.

### **Tools available:**

- see [www.united-church.ca/handbooks](http://www.united-church.ca/handbooks) for *Guidelines for Developing Ministry Personnel Position Descriptions* [PDF: 7 pp/78 KB]
- Susan Beaumont, “Designing Staff Positions” (Appendix E)
- Jill Hudson, “Twelve Characteristics for Effective 21st-Century Ministry” (available to Alban Institute members at [www.alban.org](http://www.alban.org))
- check with your Conference office for new resources or examples of position descriptions they may have on file

## 7. Other Pastoral Relationships

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The Ministry and Personnel (M&P) Committee has a particular role in various other pastoral relationships, as follows:

### Interim Ministry

Interim ministry offers particular, intentional service to a pastoral charge in a range of circumstances: change, conflict, grief, and reorientation. During the time of interim ministry, the M&P Committee continues to relate to the interim minister for specific employment issues (e.g., vacation, continuing education) and concerning inter-relationships with other staff and volunteer leaders. The tasks and focus of the interim ministry, however, are overseen and monitored by the Transition Team.

### Multiple Staff Ministries

Multiple staff ministries are those in which two or more individuals are settled in or appointed to a pastoral charge, mission, or outreach ministry. Issues of equity become important in multiple staff situations. Ministry personnel are accountable to the presbytery. It is not recommended that ministry personnel be subordinate or answerable to one another (i.e., no “senior/junior” minister relationships); however, this may depend on the model of governance in your pastoral charge.

The M&P Committee should be alert to power imbalances among ministry personnel, between ministry personnel and staff, or between staff and volunteer leadership due to

- ordained/diaconal/lay status
- full-time/part-time employment
- gender and members’ responses to gender issues
- tenure, or age and experience
- salary and benefits; office space
- theological diversity
- cultural diversity

### Part-Time Ministry Personnel Positions

Part-time ministry is any presbytery-approved ministry that is less than full-time (40 hours a week). Participation in the pension and benefits plan requires ministry personnel to work at least 14 hours a week. M&P Committee concerns in regard to part-time ministry personnel include issues of equity and fair employment. To ensure salary equity, the M&P Committee may refer to the schedule of Minimum Salary and Allowances for Ministry Personnel.

Teams including part-time positions, particularly those filled by a ministry personnel couple, require particular attention to equity between part-time and other ministry personnel. Part-time ministry personnel are entitled to one month of vacation and three weeks of continuing education leave per year, as outlined in section 036 of *The Manual*.

Part-time ministry personnel or staff who are serving a minimum of 14 hours per week (on average) must also be enrolled in the Pension Plan and the Group Insurance Plan of The United Church of Canada. Details about these plans are available from the presbytery pension convenor, Human Resources (Pension and Benefits) at the General Council Office, or from your Conference personnel minister.

## Designated Lay Ministry

A designated lay minister is “a lay member of the United Church appointed by a Presbytery to serve in paid accountable ministry in a Pastoral Charge or other Presbytery Accountable Ministry, in a position designated by the Presbytery as accountable to the Presbytery” (*The Manual, 2007*, section 001). Like any ministry personnel serving in the pastoral charge, designated lay ministers relate to the M&P Committee for consultation and support.

## Community-Based Learning

Community-based programs for diaconal and ordained ministry have specific structures in place. During these periods of training, open communication is essential between M&P Committees, educational facilitators, and student supply ministers or ministers-in-training Native ministry.

### Tools available:

- see [www.united-church.ca/handbooks](http://www.united-church.ca/handbooks) for
  - *Interim Ministry Handbook* (being revised 2010)
  - *Guidelines for Transition Teams* (to come 2010)
  - *Handbook for Designated Lay Ministry and Congregational Designated Ministry* [PDF: 32 pp/366 KB]
- schedule of Minimum Salary and Allowances for Ministry Personnel ([www.united-church.ca/minstaff/pastoral/salary/schedule](http://www.united-church.ca/minstaff/pastoral/salary/schedule))
- Mary K. Sellon and Daniel P. Smith, *Practicing Right Relationship: Skills for Deepening Purpose, Finding Fulfillment, and Increasing Effectiveness in Your Congregation* (Herndon, VA: Alban Institute, 2004)
- regionally developed resources about pastoral relationships may be available from Conference offices

## 8. Entitlements

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### Salary, Allowances, and Other Benefits

Ministry personnel are entitled to receive a number of financial and other benefits, specified in sections 036–039 of *The Manual*. These benefits are also described in some detail in the schedule of Minimum Salary and Allowances for Ministry Personnel, which is sent annually to each pastoral charge and posted on the United Church website.

The Ministry and Personnel (M&P) Committee ensures that the financial compensation package promised to ministry personnel and staff is honoured throughout the pastoral or employment relationship. The committee regularly reviews these items, referring to the completed call or appointment forms in the case of ministry personnel, and brings recommendations to the official board (or equivalent).

### Salary

Pastoral charges must ensure that the salary paid to each of their ministry personnel does not fall below The United Church of Canada minimum standard (for the minister's increment category) or the initial agreement. If in doubt as to the correct increment category, the M&P Committee can consult the Pastoral Relations group in Human Resources at the General Council Office.

If the initial call or appointment provided for financial benefits above the minimum standards, the M&P Committee may be called upon to recommend interpretations or clarifications. For example, was the initial agreement that the minister be paid “a salary of \$35,000” or “\$4,000 above whatever the minimum salary may be”? If initial negotiations were for salary above minimum, it is not appropriate that for salary to be eroded back to minimum over time.

### Housing

The M&P Committee monitors the adequacy of the manse or the equivalent housing allowance, in accordance with Canada Revenue Agency (CRA) guidelines. Basic telephone service to the manse or home is also provided to ministry personnel.

To determine the housing allowance, the presbytery/district and pastoral charge establishes the fair rental value of suitable accommodation comparable to that which would have been provided as a manse in the area. It is appropriate to obtain several (at least two) real estate estimates for such accommodations. Fair rental value must be approved by the presbytery at the time of a call or appointment and be reviewed at least every three years thereafter. Where the fair rental value is less than 20 percent of the salary being paid to the ministry personnel, the allowance is topped up to 20 percent of salary. (See the *Financial Handbook for Congregations*).

## **Other Requirements**

The M&P Committee also monitors matters such as these:

- travel is to be reimbursed at a rate not less than that established annually by the General Council Office
- adequate administrative assistance should be provided to ministry personnel

### **Tools available:**

- schedule of Minimum Salary and Allowances for Ministry Personnel ([www.united-church.ca/minstaff/pastoral/salary/schedule](http://www.united-church.ca/minstaff/pastoral/salary/schedule)), published annually by the General Council Office
- *Financial Handbook for Congregations* ([www.united-church.ca/local/congfin](http://www.united-church.ca/local/congfin))

## **Leaves**

### **Vacation and Other Leaves**

Ministry personnel and other staff consult with the M&P Committee to plan their annual vacation time, and the schedule is then reported to the official board (or equivalent).

When appropriate, the M&P Committee consults with ministry personnel and presbytery about granting maternity, parental, adoption, disability, bereavement, and compassionate leaves; and consults with ministry personnel about their involvement in other courts of the church such as presbytery/district, Conference, and General Council. M&P Committees should consult their province's employment standards to determine minimum requirements for lay employees regarding vacation, maternity/parental leave, and other leaves. Pastoral charges have the authority to go beyond provincial standards if they so choose.

### **Study Leave**

Study leave (continuing education) dates for ministry personnel are set in consultation with the M&P Committee. The focus of the study leave is also discussed.

Three full weeks (including Sundays) of continuing education each year are included in the terms of call, settlement, or appointment for all ministry personnel. Ministry personnel should be encouraged to avail themselves of their three weeks each year. A continuing education and learning resources allowance (of at least the minimum established by the General Council Office) is available to ministry personnel who take study leave.

The M&P Committee makes the necessary recommendations to the official board (or equivalent), keeping in mind the interests and priorities of the pastoral charge as well as those of the individual.

### **Sabbatical Leave**

In *Clergy Renewal: The Alban Guide to Pastoral Sabbaticals*, Richard Bruesehoff writes that it is through the leadership of pastors whose hearts sing with vision and creativity that vital congregational ministry is built.

Sabbatical leave for ministry personnel is a planned time of at least three consecutive months of paid leave as intensive enhancement for ministry and mission. Sabbatical leave follows precedents in the academic community and among a growing number of private-sector professions. This extended time is in addition to vacation and study leave, and is qualitatively different from a “vacation” or “days off.” It is an opportunity for the individual to disengage strategically from regular tasks to view ministry and mission from a new perspective.

Sabbatical leave is an extension of the biblical concept of a Sabbath day and a Sabbath year for renewal. It is both an act of faith that God will sustain us through a period of reflection, and an occasion for recovery and renewal of vital energies.

Sabbatical leave is described in detail in *The Manual*, section 039.1. It is recommended for all full-time or part-time ministry personnel serving pastoral charges, who have served in their present position for five continuous years.

The minister, in consultation with the M&P Committee and official board (or equivalent), must provide a plan outlining

- the nature of the study or experience, and its connection to the practice of ministry
- its anticipated outcome
- its length, timing, and other specifics

After the sabbatical, the minister should provide a brief written and oral report about the leave. Ministry personnel normally continue in pastoral relationship with the pastoral charge for a period of at least one year following the conclusion of the sabbatical.

**Tools available:**

- more information on Sabbatical Leave is on the United Church website ([www.united-church.ca/minstaff/pastoral/leaves/sabbatical](http://www.united-church.ca/minstaff/pastoral/leaves/sabbatical))
- contact your Conference personnel minister, the Human Resources Unit, and the Congregational, Educational, and Community Ministries Unit (CECM)
- some funding may be available; contact CECM for details

## Benefits Plans

The M&P Committee ensures that all pastoral charge employers participate in the Pension Plan and the Group Insurance Plan. Enrolment in the plans is mandatory and is a condition of employment for all ministry personnel serving 14 or more hours per week and for all lay personnel (hired after December 31, 1988) working 14 or more hours per week or less than 14 hours per week if, in each of the last two consecutive years,

- the employee earned at least 25 percent of the Canada Pension Plan year’s maximum pensionable earnings (YMPE), or
- worked at least 700 hours

In addition, members of the Group Insurance Plan are entitled to the Employee Assistance Program (EAP) and, for ministry personnel, the Restorative Care Plan.

The Employee Assistance Program (EAP) is a confidential, voluntary support service that can assist with all kinds of problems and challenges in an employee's life. The employee and eligible family members can receive support over the telephone, in person, online, and through a variety of issue-based and wellness resources. The service provider for the EAP is Shepell.fgi, available 24 hours a day, 7 days a week (toll-free: 1-800-387-4765).

The Restorative Care Plan, described in section 37 of *The Manual*, is for ministry personnel who require a short-term medical leave from their jobs. In this situation, pastoral charges are required to continue salary and benefits for up to six months. The Restorative Care Plan assists ministry personnel during their illness and assists pastoral charges with this financial responsibility. The Restorative Care Plan is accessed by contacting the Conference personnel minister.

Lay employees in a pastoral charge who participate in the group insurance plan and become disabled due to illness or injury are eligible for short-term disability benefits for a maximum period of six months, subject to a two-week qualifying period. For complete details, refer to the booklet *Benefits for Active Members: Summary of Coverage*.

For detailed benefits information, please contact the United Church Pension and Benefits Centre at 1-888-657-4607.

**Tools available:**

- *Benefits for Active Members: Summary of Coverage* [PDF: 20 pp/332 KB] ([www.united-church.ca/minstaff/benefits/health](http://www.united-church.ca/minstaff/benefits/health))
- United Church Pension and Benefits Centre ([www.united-church.hroffice.ca](http://www.united-church.hroffice.ca))

## Employment Regulations

Many employment issues regarding ministry personnel are covered in *The Manual*. Lay staff employment issues may be addressed by provincial employment standards.

The church is obliged to comply with a wide range of government regulations, including the following:

- income tax as regulated by the Canada Revenue Agency
- Canada Pension Plan and Employment Insurance withholding, remittances, and record keeping
- health and safety and workers' compensation regulation and agencies
- human rights and employment equity regulation
- provincial health levies, and employment taxes
- employment standards including hours of work, statutory holidays, minimum wages, vacation pay, and notice of termination or layoff

The M&P Committee must acquaint themselves with these regulations and stay up-to-date in order to regularly report to the official board (or equivalent).

**Tools available:**

- *Financial Handbook for Congregations* ([www.united-church.ca/local/congfin](http://www.united-church.ca/local/congfin))
- Conference personnel minister
- Presbytery Pastoral Relations and Oversight Committee
- resources from various agencies and regulators (such as Canada Revenue Agency, Human Resources Development Canada, Workplace Safety and Insurance Board, provincial employment standards, workers' compensation boards)

**Disciplinary Action/Termination**

In any case where a concern exists that may require disciplinary action, up to and including termination of the pastoral relationship, the M&P Committee must contact the presbytery and the Conference personnel minister at the earliest possible opportunity in order to ensure that the required procedures are followed, and protection is provided for all parties involved. The process for changing pastoral relationship for ministry personnel is found in *The Manual*, sections 046–047.

For lay employees, presbytery need not be consulted. However, the M&P Committee may wish to consult a lawyer before proceeding with discipline up to including dismissal.

## 9. The Annual Review

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It is the responsibility of the M&P Committee to design and conduct an annual review for ministry personnel and staff members.

The annual review is a means by which ministry personnel, staff members, and people of the pastoral charge support one another in their mutual responsibilities for ministry. It is not intended to interfere with the relationship between ministry personnel and the official board (or equivalent), or with the relationship between staff members and the committees that oversee their work. Rather, it is an occasion for helpful feedback in a climate of openness and trust that leads to constructive results.

### Structuring the Annual Review

The annual review process is established by the M&P Committee. The review is intended to facilitate two-way communication between each ministry personnel or staff member and the pastoral charge.

To begin, information is gathered concerning the work of each ministry personnel or staff member as it relates to the mission and goals of the pastoral charge. Questionnaires might be circulated or interviews conducted with the individuals and committees with whom the ministry personnel and staff members work most closely, for example, the Property Committee in the case of a caretaker, various committees for ministry personnel.

Ministry personnel and staff members can be consulted in the same way.

Once the information has been gathered, it is reviewed, confidentially and privately, by the M&P Committee with each ministry personnel or staff member. In multiple ministry personnel and staff situations, it is also beneficial for the ministry personnel and staff to meet together with the M&P Committee to review working relationships.

The annual review considers the relationships between ministry personnel and staff members, as well as the relationships between ministry personnel and staff and all of the groups and individuals to whom they relate in the course of their ministry. The review also offers the opportunity for the M&P Committee to ensure that the pastoral charge is fulfilling its obligations to ministry personnel and staff.

During the course of the review, matters may arise that should be referred to the official board (or equivalent) or another committee for resolution. The M&P Committee consults with the ministry personnel or staff member regarding issues to be referred elsewhere.

Recommendations arising from the review are recorded and shared with all parties concerned, and then reported to the official board (or equivalent). Where there is disagreement about a recommendation, every effort should be made to reach a common understanding before reporting to the official board (or equivalent). It may be helpful to consult with the Presbytery Pastoral Relations Committee to arrive at an agreement.

Recommendations should be specific and include clear expectations of both the ministry personnel or staff member and the M&P Committee. Decisions made by the official board (or equivalent) on recommendations from the M&P Committee should be communicated to the ministry personnel and staff and recorded in the personnel files.

**Tools available:**

- see Appendix D for a model of how to conduct an annual review
- see Appendix E, “Making Pastoral Evaluation Worthwhile,” by Gil Rendle
- see Appendix G for further reading on evaluation

## **Exit Interviews**

Exit interviews, held when ministry personnel and staff leave their positions in a pastoral charge, are becoming common in the United Church.

When a joint needs assessment is in progress, an exit interview for the ministry personnel is part of the process and the specific method will be decided by the Joint Needs Assessment Committee.

When a staff person is leaving, it is appropriate for the M&P Committee to recommend to the official board (or equivalent) that an exit interview take place. Given the M&P Committee’s responsibility for the annual review, the committee might be asked to undertake the exit interview as well. The exit interview can also be handled by the presbytery/district. Issues identified in an exit interview may be helpful in the subsequent hiring process.

Resources to help with this task may be available through Conference offices.

## 10. Thank You for Your Service

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It is a privilege and a challenge to be a member of an M&P Committee. Building good relationships in your pastoral charge can be exciting and rewarding work—hopefully you will also find some enjoyment in the process!

This handbook has been designed as a resource for your M&P Committee. Further assistance is always available through your Presbytery Pastoral Relations Committee, Presbytery Pastoral Oversight Committee, and Conference personnel minister.

May your work be blessed with rich experiences!

# Appendix A: For More Information

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## Contacts

### *Presbytery/District*

Each presbytery/district has a pastoral relations convenor, with whom the M&P Committee may wish to consult from time to time. See your Conference Directory, available in your local church office, for contact information.

### *Conference*

Each Conference has a Conference personnel minister, whose role is to support ministry personnel and their families, and serve as a consultant to the M&P Committee as necessary, e.g., for orientation, to develop or revise position descriptions or annual review procedures, or when difficulties arise in staff relationships. Contact your Conference office.

### *General Council Office*

The Human Resources Unit in the General Council Office provides support in pastoral relations, employee relations, and pension and benefits.

Tel: 1-800-268-3781 ext. 3161

E-mail: [PC-MEPS@united-church.ca](mailto:PC-MEPS@united-church.ca)

## Resources

The United Church website ([www.united-church.ca](http://www.united-church.ca)) has up-to-date information on many topics of interest to M&P Committees. Type relevant keywords into the search box to find what you are looking for. You can also visit your Conference's website for regionally developed resources.

Most of the resources recommended in this handbook, as well as other guidelines on related topics, can be found on the United Church website. Print copies of United Church publications can be ordered from United Church Resource Distribution (UCRD) at 1-800-288-7365, or from your nearest Presbytery Resource Centre ([www.united-church.ca/contact/prc](http://www.united-church.ca/contact/prc)).

The Handbooks and Guidelines page ([www.united-church.ca/handbooks](http://www.united-church.ca/handbooks)) is an index of many useful PDF downloads, including

- *Dispute Resolution Policy Handbook*
- *Ethical Standards and Standards of Practice for Ministry Personnel*
- *Financial Handbook for Congregations*
- *Guidelines for Developing Ministry Personnel Position Descriptions*
- *Guidelines for Transition Teams* (to come 2010)
- *Handbook for Designated Lay Ministry and Congregational Designated Ministry*
- *Interim Ministry Handbook* (being revised 2010)

- *Sexual Abuse Policy and Procedures*
- *Understanding the Sabbatical Policy for Ministry Personnel in Pastoral Relationships*

The Manual has its own dedicated webpage ([www.united-church.ca/manual](http://www.united-church.ca/manual)). M&P Committees may also find resources of interest in the Pastoral Relations ([www.united-church.ca/minstaff/pastoral](http://www.united-church.ca/minstaff/pastoral)) and Group Benefits ([www.united-church.ca/minstaff/benefits](http://www.united-church.ca/minstaff/benefits)) sections of the United Church website, or by searching relevant keywords such as “benefits” or “salary schedule.”

## Appendix B: Sample Meeting Schedule

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Each Ministry and Personnel (M&P) Committee is encouraged to develop a schedule of at least four regular meetings over the year, to cover its range of issues and concerns. For example:

### Sample Schedule, Anytown United M&P Committee

- |           |  |
|-----------|--|
| September | <ul style="list-style-type: none"><li>• Review profiles from the joint needs assessment process, pastoral charge mission statement, established goals and objectives, etc.</li><li>• Clarify roles, expectations, and any special assignments or commitments of ministry personnel and staff</li><li>• Assess working conditions; time expectations; and space, equipment, and administrative support available to support ministry personnel and staff</li><li>• Work with ministry personnel and staff to develop annual personal goals</li><li>• Do some team building with committee members, ministry personnel, and staff</li><li>• Set committee meeting dates for the year</li></ul> |
| October   | <ul style="list-style-type: none"><li>• Prior to the pastoral charge's budget setting, consult the Minimum Salary and Allowances schedule and make next year's salary recommendations</li><li>• Review manse/housing arrangements</li><li>• Review responsibilities carried out by ministry personnel</li><li>• Review lines of communication and support systems available to the ministry personnel, staff, committees, boards, and volunteers</li></ul>   |
| January   | <ul style="list-style-type: none"><li>• Plan and prepare annual reviews (to be held in February)</li><li>• Make plans for continuing education and professional development of ministry personnel and staff</li><li>• Confirm vacation plans (summer or other)</li><li>• Report on progress on the goals and objectives outlined in September</li></ul>  |
| March     | <ul style="list-style-type: none"><li>• Process the results of the annual reviews:<ul style="list-style-type: none"><li>○ personal assessment by ministry personnel and staff members</li><li>○ feedback from the committees and others with whom each ministry personnel and staff member relates</li><li>○ feedback from congregation</li><li>○ expectations ministry personnel and staff have of one another</li><li>○ recommendations to be made to the official board (or equivalent)</li></ul></li></ul>   |

June

- Reflect on the personal goals and objectives for the past year with each ministry personnel and staff member
- Assess the spiritual, mental, physical, and emotional well-being of ministry personnel and staff members (The concept of emotional exhaustion is central to understanding the phenomenon of burnout among those engaged in people-centred caring professions. The M&P Committee may point ministry personnel and other staff to several tools and resources for monitoring burnout, for example “The Scale of Emotional Exhaustion in Ministry (SEEM)”.)
- Identify issues to be referred to the September meeting of the committee
- Consult with the official board (or equivalent) regarding its plans for a goal-setting process in the fall

## Appendix C: Sample Confidentiality Agreement

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I, \_\_\_\_\_, agree to maintain and respect the confidentiality of all information including that which is personal and privileged, which comes to me as a result of carrying out my responsibilities as a member of the Ministry and Personnel Committee of \_\_\_\_\_.

I will not discuss the information that comes to me with anyone beyond the bounds of the committee.

I understand and agree that failure to maintain confidentiality will result in termination of my position on the Committee.

I, \_\_\_\_\_, have read and understood the above information and agree to the terms.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Appendix D: Model Annual Review

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Each Ministry and Personnel (M&P) Committee should establish, with the agreement of ministry personnel and staff, an evaluation procedure for conducting the annual review. The model below can be a starting point—feel free to modify it, or develop your own to suit your situation.

The starting point of any review is the goals and objectives ministry personnel and staff have adopted for the year, which must be congruent with the mission and goals of the pastoral charge. Not all aspects of ministry are easily measured, but with careful planning, an annual review can be beneficial to all participants.

### Issues to be reviewed *by* the M&P Committee

#### ***a) with each ministry personnel and staff member:***

- What progress has been made on your goals and objectives for the year? What has helped or hindered progress?
- Which goals and objectives are still valid? What needs to be done to accomplish them? Do some need to be revised or deleted? Should new ones be added?
- What strategies will enable you to attain your goals and objectives? How can the M&P Committee or the congregation assist you?
- What areas of your work do you find most satisfying? Most frustrating? How can we work together to alleviate the frustration?
- How do ministry personnel and staff keep each other informed? What helps or hinders ministry personnel and staff working together?
- Do you have any health and safety concerns about the workplace? Do you feel safe and secure?
- Do you have the equipment you require to do your job effectively?

#### ***b) with ministry personnel:***

- What is your level of satisfaction with your salary, housing, continuing education, administrative support, and other benefits and working conditions?
- How consistent is your position description with the pastoral charge's expectations?
- What are your priorities for ministry in the coming year? What effect will this have on your ministry with us?
- What is your vision for the pastoral charge for the coming year? How does it relate to the pastoral charge's goals and plans? What skills and resources would be required of pastoral charge members?
- How can this committee support you in your ministry with the pastoral charge?

***c) with other staff:***

- What is your level of satisfaction with your salary, benefits, working conditions, vacation time, and professional development opportunities?
- Does your position description provide a clear understanding of the pastoral charge's expectations of your work?
- What other expectations does the pastoral charge have of you besides those defined in your position description? What additional responsibilities would you welcome? What aspects of your job do you feel should not be your responsibility?
- How does the pastoral charge express support for your work?
- How can this committee support you?

**Issues to be reviewed *with* the M&P Committee**

***a) by each ministry personnel and staff member:***

- How have I been effective in fulfilling my responsibilities and in achieving my goals and objectives? How have I helped facilitate the pastoral charge's goals and objectives?
- To be more effective, what skills do I need to acquire or improve upon?
- How would you say I balance the time required to perform my various duties? The time for work and for my personal life?
- What would you encourage me to continue doing? Start doing? Stop doing?

***b) by ministry personnel:***

- Spiritual growth that has been significant for me during the past year includes...
- How do you see my relationships with other staff members? With individuals, families, and groups in the pastoral charge and the community?
- Discuss my involvement with session, stewards, official board (or equivalent), committees, choir, volunteers, etc.
- How has my involvement in worship, education, preaching, and administering sacraments, outreach, and pastoral care been received? Where would people welcome or resist change? Where is special attention required?
- What feedback is there from the pastoral charge? How important is it? What response, if any, should be made?

***c) by other staff:***

- How do you see my relationships with other staff members? With members of the pastoral charge?
- What feedback have the committees to which I relate in my work given?
- During the year I have tried to do the following "special things." How have these things been received? Recognized? Evaluated?
- Does the pastoral charge have any other feedback about my work?

# Appendix E: Making Pastoral Evaluation Worthwhile

(by Gil Rendle)

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Doing pastoral evaluations that are helpful to both pastor and church can be very tricky, especially in churches that tend to have unclear goals and volunteer leaders who don't always see and know all that their church and their clergy do. Let me begin with some cautions!

- Many congregations don't want to evaluate their clergy until they are unhappy with him or her. Be sure that it is not unhappiness or conflict that is driving your evaluation. These issues are best addressed in other ways.
- Most personnel committees do not know all that their pastor does or should be doing. Don't try to evaluate everything about your pastor's work. Is there a part of your pastor's work or goals where she or he would most like feedback?
- Clergy and staff should not be evaluated apart from the goals of ministry for their congregation. (The laundry list of duties and roles in the denominational book of polity is not helpful, and the personal preferences of the personnel committee members are equally unhelpful.)
- Evaluation should be *formative* (What have we learned over the past year and what should we work on next?) rather than *summative* (Is he/she good or bad? Do we keep her/him or not?).
- Many denominations provide standardized evaluations forms or processes for all of their congregations, which may or may not be helpful to you. Standardized evaluations may not honour the size and uniqueness of your congregation and your evaluation needs. Before you begin with any of these standard forms ask, Will it help? Does this get us to the conversation we need?

Having said all that let me offer several things to consider:

- The time of evaluation is an opportunity for conversation about the state of the ministry of the church. The evaluation tool or instrument is best used as a means to structure an honest conversation about what is happening, or not happening, in the life of your church and what the relationship of the role and work of the pastor should be to that work. The form of the evaluation process may not be as important as the shared conversation about it.
- I like to use a performance planning meeting document that you can find at [http://www.alban.org/Weekly/InProgress/PF/IP04\\_06\\_Rendle.html](http://www.alban.org/Weekly/InProgress/PF/IP04_06_Rendle.html). This is actually a form and process for staff supervision to be used by the senior clergy with other staff. However, the basic flow of the conversation and the periodic revisiting of the conversation is something that I encourage personnel committees to adapt with their clergy.
- One of the healthier resources that I know is Jill Hudson's book, *When Better Isn't Enough*, published by Alban. There are tools in the back for the clergy's self evaluation and for the personnel committees (and other groups if adapted) to self evaluate their own role and responsibility in the work of the church. Good luck.

"Making Pastoral Evaluation Worthwhile" by Gil Rendle is reprinted from *Alban Weekly* (No. 117, October 16, 2006), with permission from the Alban Institute. Copyright © 2006 by The Alban Institute, Inc., Herndon, VA. All rights reserved. Visit The Alban Institute at [www.alban.org](http://www.alban.org).

# Appendix F: Designing Staff Positions

(by Susan Beaumont)

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Many congregations spend considerable time in the creation of job descriptions without asking the fundamental questions required to effectively design a staff role. Robert Simmons of the Harvard Business School recommends addressing these four basic questions in the design of any staff position.<sup>1</sup>

1. What resources will the staff member be able to control in order to accomplish assigned tasks? (Span of Control)
2. What measures will be used to evaluate the staff member's performance? (Span of Accountability)
3. Who does the staff member need to interact with and influence to achieve goals? (Span of Influence)
4. How much support can the staff member expect when he or she reaches out to others for help? (Span of Support)

## The Span of Control

The span of control defines the range of resources (people, assets, infrastructure) for which a staff member is given decision-making rights. Typically the span of control is established by assigning reporting relationships (who does this staff member report to and who reports to this staff member), assigning budget line items of responsibility, and setting spending limits. Different staff members should have different levels of authority when it comes to making decisions about allocating resources, but every member should have some defined level of freedom for decision making in their area of responsibility.

Entry level or inexperienced staff members will typically be assigned a narrow span of control, meaning that they have narrow decision-making rights. As a staff member grows in wisdom and experience, the congregation can widen the span of control as a form of leadership development. However, it is important that the span of control in each staff role relate logically to the span of control in corresponding staff positions. Your head of staff should always have a span of control that exceeds the span of control of every other staff member. A staff member should never have a span of control wider than the person to whom she reports.

A common question that emerges around the issue of span of control is this one. What is the appropriate number of people for any one person to supervise? There is no easy, uniform response to that question. Generally speaking, it is important to consider the number and ease of required contacts, the degree of specialization in the positions that report to a supervisor, and the ability to communicate with direct reports. Bear in mind that the number of potential interpersonal relationships between a supervisor and subordinate increases exponentially with each added direct report. This holds true because supervisors must contend with the direct relationships, with a group relationship, and with the cross relationships between each of the people that report to them. It is

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<sup>1</sup> Robert Simmons, "Designing High Performance Jobs," *Harvard Business Review* (July–August 2005): 55–62.

easier to supervise a group of people with very similar areas of specialization (e.g. youth small group leaders) than it is to supervise people with very different specializations. It is simpler to supervise people in close physical proximity than it is to supervise people who work at a distance. It is easier to supervise people who are very much alike in terms of temperament, background, and experience. The greater the diversity, the greater the distance, and the greater the variety of specializations the smaller the number of direct reports ought to be.

## **The Span of Accountability**

The span of accountability refers to the measurable goals that a staff member is expected to achieve and the range of trade-offs available to affect those measures. A narrow span of accountability generally involves simplistic, easily definable measures: a line item in the budget, enrolment or attendance numbers, number of groups or classes offered, etc. In a narrow span there are few variables or trade-offs that can impact the outcome being measured. A wider span of accountability uses broader measures that incorporate many variables of congregational life. Examples include the general level of giving, overall worship attendance, and spiritual growth of the membership. The wider the span of accountability, the greater number of variables and the greater the number of trade-offs that must be managed.

Generally speaking, the span of control and the span of accountability ought to be established in tandem with one another. People should never be held accountable for things over which they have no control. However, a congregation that wants to encourage a creative and entrepreneurial spirit will try to set the span of accountability just a little bit wider than the span of control. This gap encourages risk taking and greater creativity. However, if the gap becomes too wide, employees become discouraged and frustrated at being held accountable for things outside their control.

## **The Span of Influence**

The span of influence describes the width of the net that an individual needs to cast in gathering data, collecting new information, and attempting to influence the work of others. A staff member with a narrow span of influence does not need to pay much attention to people outside of his area of responsibility to do his job effectively. An individual with a wide span must interact with and extensively influence people in other areas of ministry. Generally speaking, in faith communities we are always seeking to enhance the community by building greater interconnectedness and wider spans of influence. However, at times it can be a waste of congregational resources, and even distracting to congregational mission, to encourage specialized entry level functions to influence all aspects of congregational life.

A congregation that is interested in increasing the span of influence among its staff members can take several actions. The job description can be rewritten to suggest a broader area of influence. Goals can be set that require broader interaction of staff members. Cross-functional teams can be established to tackle emerging projects and problems. The span of influence should be set a little wider than the span of control to encourage staff members to work across boundaries and solicit help from one another.

## The Span of Support

The span of support refers to the amount of help an individual staff member can expect from people in other parts of the congregation. When the span of support is narrow, staff members are very highly focused on their own performance and accomplishment of goals. A wider span of support emphasizes shared responsibilities through purpose, mission, and strong group identification. A congregation cannot adjust a job's span of support in isolation because it is largely determined by the staff's sense of shared responsibilities, which in turn stems from a congregation's culture and values. In most cases, all of a congregation's staff will operate with a wide span of support, or none will. Various practices and policies of the congregation can help to create or destroy a shared sense of purpose and support among staff members. A clearly defined mission, fair and equitable pay practices, and clearly defined roles and responsibilities all contribute to wider spans of support within a congregation. Keeping the spans of control, accountability, influence, and support properly defined and aligned within a congregation can be challenging. However, thinking about your staff positions along these four dimensions will allow for better alignment of staff roles with congregational objectives. Over time each of the spans will likely shift in response to changes in congregational circumstances and strategies. Being intentional about revisiting and revising the four spans will enhance the effectiveness of your staff.

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# Appendix G: Further Reading

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## Books

Brinkerhoff, Robert O., *The Success Case Method: Find Out Quickly What's Working and What's Not* (San Francisco, CA: Berrett-Koehler Publishers, 2003).

Combines survey and storytelling methods to produce evaluations with impact.

Cahalan, Kathleen A., *Projects That Matter: Successful Planning and Evaluation for Religious Organizations* (Herndon, VA: The Alban Institute, 2003).

Introduces project planning in a framework of conditions, resources, activities, results, impact, and rationale, and identifies six effective steps in the evaluation process.

Clark, Catherine H., *Annual Church Review Procedure: The Church's Ministry and the Minister* (Herndon, VA: The Alban Institute, 1986).

Provides questionnaire templates to evaluate ministers, committees, and communities.

Hudson, Jill M., *Evaluating Ministry: Principles and Processes for Clergy and Congregations* (Herndon, VA: The Alban Institute, 1992).

Based on understanding ministry as collaborative between congregation and pastorate; may be used for evaluation or contract provision.

Hudson, Jill M., *When Better Isn't Enough: Evaluation Tools for the 21st Century* (Herndon, VA: The Alban Institute, 2004).

Offers new criteria for evaluating church effectiveness, adding discernment and formative evaluation to more traditional summative evaluation.

McClintock, Karen, *Healthy Disclosures* (Herndon, VA: The Alban Institute, 2007).

McMahill David R., *Completing the Circle: Reviewing Ministries in the Congregation* (Herndon, VA: The Alban Institute, 2003).

A system to help church leaders ask for, receive, and use reliable, effective feedback.

Oswald, Roy M., *Getting a Fix on Your Ministry: A Practical Guide to Clergy Performance Appraisal* (Herndon, VA: The Alban Institute, 1993).

Acknowledging the damage that can result from attempts at clergy evaluations, this book affirms two evaluation models: one for all church leaders and members, and one for clergy leaders.

Woods, C. Jeff, *User Friendly Evaluation: Improving the Work of Pastors, Programs and Laity* (Herndon, VA: The Alban Institute, 1995).

Perhaps the most comprehensible survey of evaluation techniques and purposes available.

## Web Article

Spiritual Windsurfing: Exploring the Context for Evaluation ([www.congregationalresources.org/SpiritualWindsurfing/Introduction.asp](http://www.congregationalresources.org/SpiritualWindsurfing/Introduction.asp))

Examines issues to consider before beginning a ministry evaluation, such as calling, self-knowledge, and prophetic role.



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