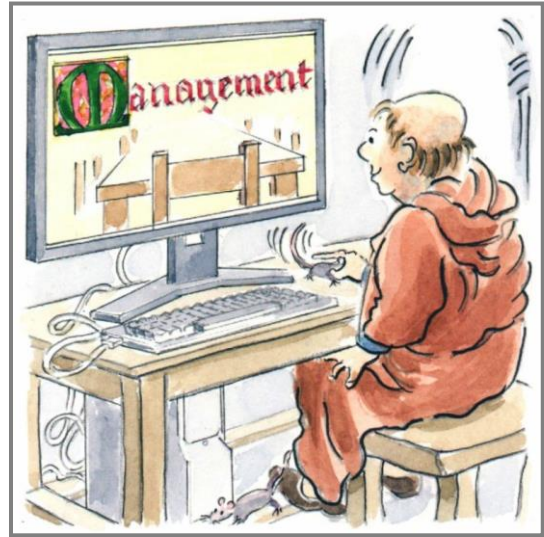


Suggested questions for an annual review

TN17 Training Notes series: Management



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The idea of reviewing the work of a member of staff is something that many pastorally minded leaders shy away from. The concept of offering such a review to every volunteer worker in a church would be regarded as even more questionable.

That is odd. The principle of working through the past so that there can be a better future is deeply embedded in Christian theology. The concept of review should be one of seeking the best for everyone. It ought to be a principle of health, of learning and of discipleship.

But where do you start? Here is a list of questions that you might like to work from as you devise your own. The notes are designed to enable you to apply them either to an individual worker or to a team working together.

The following questions have many possible applications. They have been worded with both a full-time member of staff and a close-knit team in mind, whether in a church or any kind of mission agency. So they may need to be adapted or simplified in your case.

Possible uses:

- A member of staff employed by a church (if part-time, do not make it too fearsome; so cut down from the list shown here).
- Any member of staff employed by a Christian mission agency, whether working from an office base or as a field worker.
- A volunteer worker in any church: the leader of a small group or young people's group, the Treasurer (why not?), a member of a bereavement team, a working group convener. As above, simplify what follows to make it appropriate for the post in question.
- A genuine team of any kind: the Music Group, the Church Council or Trustees, a bereavement team together, a leadership team of any kind.

It is assumed that the person or team having the review will have been given the questions some days ahead and asked to think them through in advance. Sometimes people are asked to fill in a pro-forma but this is not essential and can make the event rather too formal.

The choice of person or people asking the questions will depend on a number of factors. Here are some ideas.

- A line-manager for an employed member of staff.
- A broader group which includes the line-manager (but do not have more than two or three).
- A person responsible for the relevant area of ministry for a volunteer.
- Someone skilled in interviewing, perhaps with the person more directly responsible.
- The team together for a team review.
- An external facilitator for a team.

In what follows note the balance between the past (and present) and the future. You review the past so that you can plan for the future. And the review in Year 2 should be starting from what was agreed at the review in Year 1, rather than being seen as a separate event.

A period of a year is assumed but it might just as easily be six or nine months. In short-term appointments, six monthly may make more sense than a full year. For voluntary posts, though, it is probably better to stick to annual.

When reviewing a team, the word 'you' should read 'you all'; there needs to be a corporate answer in some form.

Asking about the past year

- 1 What has given you greatest satisfaction or joy over the past year, and why?

Do not rush this question. It should lead to several supplementaries. Let everything start on a positive note. Note that the question is wider than 'Which parts of the job have given you ...'. You might consider the work, the relationships involved, the spirituality, etc.

- 2 What has given you most disappointment or frustration over this year, and why?

The question can be as wide as the first one. When working with a team, the level of honesty will depend on how open the team is and how strong the relationships within it.

- 3 Take the list of aims set at your last review (or, if that is not available, each of the responsibilities listed on the job or role description, or the areas that the team is responsible for or the values they have agreed to work to). Score each on a scale of achievement from 10 (completely achieved) to 0 (done nothing).

This assumes a list of aims agreed the previous year – see Q5 in the second list below for more on this. If this is a first review, you need a well-constructed job or role description with a limited number of areas of responsibility. For a volunteer, aim to keep to just two or three broad areas.

- 4 Comment on each score. For lower ones, explain why you feel the aims have not been achieved as much as they might have been (for example, you may feel that some are inappropriate, or need much more time).
Focus on the lower scores. The causes may lie in several possible places. There may need to be some discussion if the reviewer feels that some have been scored too high or too low.
- 5 Do the same (ie. score and comment) for any responsibilities you feel you have which are not listed on the aims set last year (or the job description).
You might be able to omit this. But for a team consider especially how the team as a whole is working together.
- 6 Do the same for your own spiritual growth and your responsibilities to your family (or friends) and to yourself.
This might be the place to insert something about a team's spiritual progress together.
- 7 What lessons has the church/organisation (or have I) learnt from any points above? And what lessons does the church/organisation (or do I) still need to learn?
'I' refers to the line-manager, the person responsible for this area of ministry, or the team leader, not the person being reviewed. A review is a two-way process and everyone taking part should be seen to be open to the views of others about them.
- 8 What lessons have you learnt from any point above? And what lessons do you still need to learn?
Questions 7 and 8 are essential in some form if all are to learn from the past and move on into the future. For a team QB might need to be split into a corporate 'you' and individual 'you's'.

Asking about the year to come

- 1 At the end of this next year (or your time on the staff / in this area of ministry), what would you like to have achieved (in work, relationships, spirituality, etc.) to feel you had done the job to your own full satisfaction, given the limited resources and time available?
For a team you might like to start this by asking instead about achievement in how the team is working together.
- 2 To be able to achieve this, what additions or changes would you like to suggest in the following:
- For an individual:**
- the way you are managed and/or employed;
 - the responsibility you are allowed to exercise;
 - the spiritual input you receive;
 - the resources you are allocated;
 - the skills you need to develop;
 - the people who work with you (staff and volunteers);
 - anything else you want to add.

For a team:

- the membership of the team;
- the way you relate to each other (understanding, expectations, handling conflict, respect, relaxing together);
- the roles you play;
- the way the team is led;
- the team training you receive together – and the way each of you is supported;
- the terms of reference that the team has;
- the spiritual input you receive together;
- the way your meetings and decision-making work out;
- your communication with each other;
- anything else you want to add.

3 What changes or developments would you suggest be made to your job description (or team task) as from now?

4 What changes would you like to see in our relationship and in the way we work together? And the way the whole staff work together?

'We' relates to reviewer and the one being reviewed. For a team this would be a question about team relationships.

5 What aims do you suggest we set together for the coming year?

An aim is something to have been achieved within the job or role description over the coming year or other interval. For both individuals and teams, the list should include outputs and relationships. Some might be specific projects that year, some might be developments in performance, understanding or behaviour. Don't have too many.

6 How do you feel about the next year at the moment? And similarly if, together, we made any changes you are suggesting?

Remember, these are only suggestions for you to work from. Simplify this considerably for a volunteer and adapt the questions to fit your needs. Note also that for paid staff it can sometimes be better to carry out such reviews every six months rather than annually.

These notes are available at <https://www.john-truscott.co.uk/Resources/Training-Notes-index> and then TN17. They cover one aspect of a possible training event for churches on staff management, working with volunteers, or working together as a team. See also Articles A32, *Be creative as a line manager*, and TN45, *How to lead a team at church*. Also Training Notes TN20, *Line management in a church staff team*, TN31, *Affirming volunteers*, TN65, *Sharp interview questions*, and TN95, *Exit interviews for everyone*.

Contact John if you would like to enquire about the possibility of his running an event on the management of either staff or volunteers.

Cartoons are by Micki Hounslow for filing categories Leadership, Management, Structures, Planning, Communication, Administration. File TN17 under Management (with a link to Planning).

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