

Pastoral Reviews & Personnel Policies (Shared Team Ministry)

PART I: Values to Guide Personnel Policies and Procedures

1. To support the health of the Pastoral Team and the congregation, [*Church Name*] commits to the following values with respect to pastoral reviews, personnel policies, and employment decisions:
 - to seek to nurture a relationship of trust between Pastors and lay leaders, between Pastors and the congregation, among Pastors, and between Pastors and staff;
 - to engage in pastoral reviews and employment decisions in a manner that is self-reflective—inviting Pastors, lay leaders, and the congregation to consider their own strengths, how they are growing in faith and maturity, how they are contributing to patterns that need modification, and how they are being challenged to grow and be transformed;
 - to seek at all times to support the spiritual, emotional, and physical health of Pastors, staff, lay leaders, and the congregation—mutually engaging one another with a spirit of care, curiosity, and humility, and asking questions before providing solutions, while also discerning and speaking with courage and grace into challenges that might be emerging; and
 - to listen for God’s leading in all that occurs with respect to pastoral reviews, personnel policies, and employment decisions recognizing that at times external support may be needed to assist in this listening and in discerning appropriate action.

PART II: Pastors and the Personnel Committee

A. Pastoral Team

1. The Pastoral Team at [*Church Name*] comprises [*two*] pastors who share the leadership of the congregation.
 - a. [*Church Name*] structures its Pastoral Team in a collaborative model.
 - b. The Pastors are accountable to the Personnel Committee.¹

¹ In some congregations, the Personnel Committee is known as the Pastor-Congregation Relations Committee.

B. Job Descriptions

1. Each Pastor is given a job description that identifies the overarching vision of the congregation, the congregational vision for the Ministry position, the tasks of the position, and the skills expected of the person filling this position.

C. Personnel Committee

1. The Personnel Committee shall comprise three to five members in addition to the Church Council Chair (or his/her designate), who will be available as a resource to the committee.
 - a. While the Church Council Chair is invited to each Personnel Committee meeting, it is not expected that he/she attend every meeting.
 - b. One member of the Personnel Committee will act as chair of the committee and will be a member of the Church Council.
 - c. One member will be chosen specifically for his/her skills in human resources.
 - d. The following responsibilities will be expected of committee members:
 - to call together focus groups, as outlined in this document;
 - to meet with Pastors as outlined in this document;
 - to organize reviews, as outlined in this document; and
 - to manage employment decision procedures, as outlined in this document.
 - to negotiate employment contracts, holidays, leaves of absence, salaries, etc. with Pastors. (Employment contracts and salaries are negotiated at the start of employment and are reviewed on a yearly basis.)
 - e. The Personnel Committee is accountable to the Church Council.
2. Members of the Personnel Committee will be chosen for their capacity to bring insight and wisdom to their role and their desire to live by the values laid out in this document. In addition, Personnel Committee members will be chosen with a view to ensuring a balance of age and gender on the committee. The Personnel Committee will be chosen by the Discernment Committee with input from the Pastors, the existing Personnel Committee, and the Church Council.
3. The terms of the members on the Personnel Committee will be staggered to ensure stability. Members of the Personnel Committee will be offered an initial three-year term, following which they may renew their term, for a maximum of two terms. Following a second term (six years), members of the Personnel Committee will be asked to take a sabbatical from this role for a minimum of one year.

PART III: Accountability and Communication

A. Pastoral Team Meetings

1. Pastoral Team meetings are held at least once a month and are led by a member of the Pastoral Team. These meetings are for engaging in conversations regarding the health of the church, sharing information, addressing key emerging concerns, building team relationships, etc.

B. Accountability

1. Pastors are accountable to the Personnel Committee. The Personnel Committee will meet with each Pastor member at least three times per year to provide feedback, to set personal goals, etc. These meetings will also include actively checking in with each Pastor regarding his/her vocational well-being, his/her work-life balance, etc.
2. In situations where a Pastor is encountering challenges in one or more areas of his/her job description, the Personnel Committee will offer one or more of the following by way of support:
 - increased guidance, provided by the Personnel Committee;
 - engagement with a focus group drawn from the congregation;
 - training courses, as appropriate;
 - leadership/conflict coaching provided by a coach external to the congregation;
 - mentoring provided by an experienced pastor external to the congregation; and/or
 - assessment of the Pastoral Team dynamics, provided by an external consultant, with recommendations regarding how these concerns might be addressed.

(Note: If a situation relates to a matter of ministerial misconduct, it will be addressed under the “Matters of Ministerial Misconduct” policy below.)

3. To support the Personnel Committee in their leadership, Personnel Committee members will receive regular opportunities for leadership training/coaching.
4. Each year, all Pastors will be asked to identify concrete objectives for meeting the expectations of the job, as well as one personal goal and two professional goals associated with their job description.

C. Mentoring

1. In situations where a member of the Pastoral Team is new to ministry, a senior member of the team will enter into a more intentional mentoring role with this Pastor, offering monthly meetings and other additional support, as appropriate.
2. Mentoring meetings will include developing concrete plans for meeting the objectives of the job description, sharing these plans with the mentoring Pastor (and if appropriate, the lay leaders associated with the new Pastor’s job description), receiving feedback on plans, and evaluating plans following their execution.

PART IV: Feedback from the Congregation

A. Focus Groups

1. When appropriate—in the case of new ventures or when focused support or feedback by a Pastor is desired—selected members of the congregation will be invited by the Personnel Committee to join a Focus Group. This Focus Group will meet with its designated Pastor either on an ad hoc basis or more regularly (monthly, bi-monthly or quarterly).
 - a. The Focus Group will be chosen with input from the Personnel Committee and the Pastor to which the Focus Group is relating.

- b. Focus Group members will be chosen for their connection to the ministry, their capacity to bring insight and wisdom to their role, and their desire to live by the values laid out in this document. In addition, Focus Group members will be chosen with a view to ensuring a balance of age and gender.

B. Yearly Surveys

1. Once per year, the Pastoral Team, in collaboration with the Personnel Committee, will provide a survey to all lay leaders in the congregation. People who are not lay leaders will be invited to submit a survey if they wish.
2. The intention of the yearly survey is to review the health and vision of the congregation and the effectiveness of the congregation's ministries, etc. The intention of the survey is not to review specific pastors.²
3. The Pastors will collate the data from the yearly surveys, using it to guide their leadership in the congregation. The outcome of the yearly surveys will be shared with the Personnel Committee and the Church Council. The Pastoral Team will draft a one-page summary of the survey feedback to share with the congregation.

C. Direct Dialogue

1. The congregation is encouraged to engage members of the Pastoral Team directly should they have feedback to offer, maintaining a spirit of grace and curiosity. Words of thanksgiving, encouragement, and suggestions for modification are welcomed. Similarly, Pastors and Staff will seek to receive and engage the congregation's feedback with a spirit of grace and curiosity.
 - a. Should a member of the congregation not feel comfortable talking directly with a Pastor, he/she is welcome to talk with the Personnel Committee. The Personnel Committee will consider the feedback and, if appropriate, will share this feedback with the Pastor, strategizing with the Pastor how to address this feedback.
 - b. If a Pastor feels unfairly criticized by a member of the congregation, he/she is welcome to talk to with the Personnel Committee. They will strategize together how to address this concern.
2. For each of the situations identified in C.1. above, the Pastor and the Personnel Committee will consider the matter and, if appropriate, will implement one or more support actions described below.
 - a. The Personnel Committee will offer guidance and/or coaching for the Pastor regarding how to address the issue with the member of the congregation directly.
 - b. The Personnel Committee will dialogue directly with the member of the congregation to hear the member's concern and to determine appropriate next steps. The Personnel Committee may encourage the member of the congregation to modify his/her approach to the Pastor.

² The yearly surveys are meant to capture a snapshot of how the congregation feels it is meeting its own vision and mission, similar to assessing personal health goals at an annual physical check-up. In this kind of survey, congregation members are being asked to assess where they are healthy already and what areas may need attention.

- c. The Personnel Committee will facilitate dialogue between the Pastor and the member of the congregation.
- d. The Personnel Committee, in conversation with the Pastor, may engage an external consultant or the Area Conference Minister to support them in addressing the situation by offering an assessment of the situation, coaching, mediation, etc.

(Note: When the concern raised by one or more of the parties is a matter of ministerial misconduct, it will be addressed under the “Matters of Ministerial Misconduct” policy below.)

D. Substantial Reviews for Pastors

1. While Part III and Part IV (A, B & C) offer avenues for general feedback for Pastors, substantial reviews are opportunities to provide formal assessment of ministry goals and fit related to the vision and mission of the congregation.
2. The Personnel Committee will provide the congregation with an opportunity for a more substantial review of their Pastors after their second year in ministry. Substantial reviews will proceed in three-year intervals following the first substantial review. The Personnel Committee will seek to stagger the Pastors’ reviews, such that the congregation will be engaged in a maximum of two reviews in one year.
 - a. In cases where a Pastor is on a five-year term, the substantial review will occur in the fourth year of the Pastor’s contract.
3. Before commencing a substantial review for a Pastor, the Personnel Committee will contact the area conference to seek resources on guidelines and best practices for conducting such reviews.
4. The Personnel Committee, in consultation with the Church Council Executive, will appoint a Review Committee to lead the review process. This Review Committee will comprise two members of the Personnel Committee and up to three members of the congregation.
5. Members of the Review Committee will be chosen for their capacity to bring insight and wisdom to their role and their desire to live by the values laid out in this document. In addition, Review Committee members will be chosen with a view to ensuring a balance of age and gender.
6. Throughout this process, the Review Committee will maintain enhanced communication with the Pastor being reviewed and the Church Council Executive. At any step of this process, members of the Review Committee may draw on the Church Council Executive and the Personnel Committee should they require increased support, encounter questions they cannot answer, etc.
7. The Pastors not being reviewed are invited to submit a survey response, signed, directly to the Pastor being reviewed to allow for direct dialogue between the pastors regarding the review.

8. Opportunities to provide feedback for the Pastor's review will be made available to the whole congregation by way of a survey.³ In addition, Focus Groups will be called to allow for conversational feedback.
9. The Review Committee will provide the congregation with a statement regarding the ministry position they are reviewing. The Review Committee and the Pastor being reviewed will craft this statement together. A summary of this statement will be provided verbally to the congregation at the time the review process is initiated. In addition, this statement will be provided at the beginning of the survey. This statement will include the following:
 - the purpose of the review;
 - the values that Guide the review process;
 - the overarching vision of the congregation;
 - the congregation's vision for the ministry being reviewed;
 - the job description of the Pastor being reviewed;
 - the actions/goals taken by the Pastor in fulfillment of this job description;
 - any changes made by the Pastor as a result of previous reviews; and
 - other information relevant to the review (for example, information regarding extenuating circumstances that have influenced the ministry over the previous three years).
10. Survey and Focus Group questions will include questions regarding the Pastor's job description, the goals/objectives of this position, and the Pastor's ministry. The questions should also elicit self-reflection for members of the congregation regarding the congregation's health and vision and the intersection of these with the Pastor's job description. Questions will be framed in such a manner that they generate both positive feedback and opportunities for growth for the congregation, for the ministries of the congregation, and the Pastor.
11. The survey will ask for data related to the person filling out the survey (name, age, years at the congregation, membership at [*Church Name*], and level of connection with Pastor/Pastor's ministry). The intention of this data is to determine whether patterns exist according to the sector to which the respondent belongs.
12. The survey will include a poll⁴ giving the congregation the opportunity to affirm one of the following:
 - a. I support the ongoing ministry of this Pastor at [*Church Name*] for the following reasons...
 - b. I support the ongoing ministry of this Pastor at [*Church Name*] for the following reasons... In addition, I would like to register the following reservations...

³ This survey is not the same as the annual survey, which is about the congregation's overall health; nor is it meant to be a plebiscite on whether a Pastor remains or goes. Nevertheless, the survey is meant to provide feedback for the pastor and to assess the ongoing fit of the Pastor and the congregation with one another.

⁴ This poll is not a vote and is not intended to be seen as a vote. Instead this poll is intended to give the pastor and the congregation's leadership a sense of how the congregation sees the ongoing fit between itself and the Pastor. The decision regarding a Pastor's ongoing ministry rests with the Church Council.

- c. I do not support the ongoing ministry of this Pastor at [*Church Name*] for the following reasons...
13. The Review Committee will collate feedback from the survey and the Focus Groups. The Review Committee will consult with the Area Conference Minister on guidelines regarding how to interpret and present data gathered during the review.
14. The Pastor will not receive raw data/comments. Instead, the Review Committee will develop a summary document to be shared with the Pastor.
15. At this stage, the Review Committee will turn the outcomes of the review over to the Personnel Committee. The Personnel Committee will continue to work, as appropriate and/or necessary, with the outcomes of the review.
16. The Personnel Committee and the Pastor being reviewed will work together according to the values identified in this document, and in a spirit of collaboration, to consider the feedback, to brainstorm options for engaging the feedback from the review, etc.
 - a. The Pastor and the Personnel Committee will consider the results from the poll. The information from this poll will be used to assess together the Pastor's ongoing tenure in the congregation. Should the poll show significant disfavour (greater than 15%) with the ongoing tenure of the Pastor in the congregation, the Personnel Committee and the Pastor, together with Church Council, will strategize together how to proceed. Options include the following:
 - ending the relationship between the Pastor and the congregation in a manner that offers dignity to the pastor and honours the diverse voices of the congregation; or
 - developing a plan to address the concerns raised by the congregation. This plan will be shared with the congregation.
 - b. If the survey results show a significant imbalance in sector responses (for example, should 100% of sector X support a Pastor and 50% of sector Y not support this same Pastor) then the Pastor, the Personnel Committee, and the Church Council Executive will be alerted as this is typically an indicator of broader ill-health in the congregation.
 - Should such a situation occur, the Pastor, the Personnel Committee, and the Church Council Executive will consider next steps, which may include developing a plan to address concerns raised by the congregation, improving the "internal marketing" for a particular ministry, addressing broader questions of congregation health, and/or strategizing together how to end the relationship between the Pastor and the congregation in a manner that offers dignity to the Pastor and honours the diverse voices of the congregation
17. A high-level summary of this process and its outcomes will be shared verbally with the congregation, together with a preliminary plan of action in response to the review should such a plan of action be appropriate.

PART V: Ongoing Employment Decisions

1. Following the initial vote on whether to call a Pastor, the congregation will no longer engage in an official voting process as a means of determining a Pastor's fit with the congregation.
2. The congregation invests authority in the Personnel Committee to review the congregation's feedback regarding the Pastor and his/her ministry (including information gleaned from polls) and to engage a Pastor in dialogue regarding this feedback. As a part of this dialogue, the Pastors and the Personnel Committee will pay attention to questions of ongoing fit between the Pastor and the congregation.
3. One year following each substantial review, the Personnel Committee and the Pastor will engage in an intentional conversation regarding the fit between the Pastor and the congregation, taking into account actions the Pastor has taken to address feedback received from the Personnel Committee and the congregation to date. The outcome of this conversation could include the following:
 - a decision to renew the contract of the Pastor;
 - a decision to renew the contract of the Pastor with an invitation to further action to address feedback received from the Personnel Committee and the congregation;
 - a decision not to renew the contract of the Pastor, if the Pastor is nearing the end of a contract; or
 - a decision to terminate an existing contract, if the Pastor is in the middle of a contract.
4. The Personnel Committee will make a recommendation to the Church Council based on its conversations with the Pastor. The Church Council will review the Personnel Committee's recommendation. The Personnel Committee will advise the Pastor and the congregation of the decision regarding the ongoing employment of the Pastor with [Church Name].

Part VI: Conflict on the Pastoral Team

Step 1

Those in conflict are encouraged to engage in self-reflection, considering the cause of their concern, their own contribution to the situation, the avoidance of unhealthy triangulation, and their values associated with dealing with conflict well.

Step 2

The parties to the conflict are encouraged to set a confidential and appropriate time and place to meet to address the conflict.

Step 3

The parties to the conflict are encouraged to talk directly with one another to resolve the situation.

Step 4

If the situation is not resolved adequately at Step 3, the parties to the dispute may meet with a mutually agreed-upon third member of the Pastoral Team. This third party will listen to the two parties involved and, if appropriate, encourage them to proceed with further direct conversation with one another or, alternatively, he/she will mediate the dispute between the parties by facilitating their dialogue to explore their issues, interests, and options for resolving, managing or transforming the conflict.

Step 5

If the conflict is not resolved at Step 4, the parties involved will talk with the Personnel Committee. The Personnel Committee will contact the area conference.

- Together with the area conference, the Personnel Committee will discern how best to proceed.
- The Personnel Committee, with the area conference may appoint an external conflict specialist to interview the parties involved. The conflict specialist will assess the situation and make recommendations regarding next steps. Such next steps could include coaching for the parties involved, mediation, training and/or other recommendations.

Step 6

If the recommendations of the conflict specialist have been acted on and no resolution has been found, the Personnel Committee will either include the issue of conflict in their regular reviews/discernment with the Pastors or appoint an external investigator to provide a review as per the “Matters of Ministerial Misconduct” policy.

Part VII: Matters of Ministerial Misconduct

1. Extreme cases of concern regarding ministerial misconduct do arise in congregations from time to time. Examples of ministerial misconduct may include one or more of the following: harassment, actively nurturing divisions in the congregation, sexual misconduct, fraud, misuse of alcohol or drugs, etc. (See *A Shared Understanding of Ministerial Leadership*, page 55 ff)
2. In situations where a Pastor is accused of misconduct by a colleague, an individual in the congregation, or someone external to the congregation, the Personnel Committee will refer the matter to the area conference and follow the process as outlined there.

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