**Performance Management Policy**

|  |
| --- |
| This is a template policy developed for general use by Baptist Churches in NSW and ACT and may not necessarily be suitable for you and your church's situation.  The information provided in this document is accurate and up-to-date as of the time of writing. However, due to the possibility of changes in circumstances or changes in legislative requirements and best practise, we cannot guarantee the continued accuracy or relevance of the content.  It is recommended that you consider whether the information is appropriate to your needs, and where appropriate, seek professional advice.  This document should be used and read in conjunction with the *Guide to the Template Policies* document. |

**Purpose**

**ABC Baptist Church** is committed to the biblical principles of growth, stewardship, and service.

By prioritising development of our people through open and honest communication, we create opportunities for individuals to fulfill their God-given potential and make meaningful contributions to their workplace and community.

**ABC Baptist Church** seeks to do this through implementation of a performance management and review system that provides regular, objective assessment of progress, and meaningful feedback.

**Objectives**

The specific objectives of performance management are to:

* + Maximize the performance and contribution of workers towards fulfillment of

**ABC Baptist Church’s** Vision and Mission

* + Measure and assess individual performance fairly and objectively against role related criteria and agreed performance targets
  + Identify ways in which **ABC Baptist Church’s** workers might develop new skills or competencies and enhance their individual performance and growth.

Effective and honest communication between **ABC Baptist Church’s** workers and **[leadership/ management/ supervisors etc]** is essential to the process, so that the system benefits everyone at **ABC Baptist Church.**

**Definitions**

|  |  |
| --- | --- |
| Misconduct | Behaviour in the workplace that breaches standards required in Policies, Procedures and Values. This also includes breaches of professional standards and requirements given by the registering body for registered/licensed employees such as Accredited/ Recognised Ministers, Accountants. |
| One-on-ones | One-on-ones are a regular check-in between workers and their **[leadership/ management/ supervisors etc]**. The purpose is to give feedback, keep each other in the loop, resolve issues, and support workers to grow in their roles. |
| Poor Performance | A level of work performance or behaviour that fails to meet the expectations defined in the Position Description, Policy and Procedures or Vision. This may mean unsatisfactory quality, quantity or timeliness of work, poor teamwork or lack of leadership or technical skills. |
| Serious misconduct | The Fair Work Regulations define Serious Misconduct as:   1. wilful or deliberate behaviour by an employee that is inconsistent with the continuation of the contract of employment and: 2. conduct that causes serious and imminent risk to: 3. the health and safety of a person; or 4. the reputation, viability or profitability of the employer’s business   This includes each of the following:   1. the workers, in the course of their employment, engaging in:    1. theft; or    2. fraud; or    3. assault; 2. the workers being intoxicated at work 3. the workers refusing to carry out a lawful and reasonable instruction that is consistent with the worker’s contract of employment. |
| Support person | A person nominated by a worker who attends meetings with them to provide support to that worker. |
| Workers | Includes pastors, employees and volunteers. |

**The benefits**

Ephesians 4:25 instructs us to *put off falsehood and speak truthfully to your neighbor, for we are all members of one body*. It is necessary to hold each other accountable in the workplace, not only for individual success but also for the wellbeing of our team.

Performance management helps **ABC Baptist Church’s** workers by:

* + Providing a clear, objective and documented outline of expectations regarding their level of work performance, giving workers a clear idea of the results they are expected to achieve;
  + Providing agreed standards for assessment of performance;
  + Providing constructive feedback on progress, both positive and negative, and identifying strategies to overcome any difficulties;
  + Encouraging workers, individually and with their **[leadership/ management/ supervisors etc]** to consider their training needs and reinforcing management’s responsibility for providing relevant work-related training;

### Performance management helps **[leadership/ management/ supervisors etc]** by:

* + Encouraging open communication with workers including feedback and encouragement;
  + Providing agreed standards against which workers’ performance is assessed;
  + Enabling **[leadership/ management/ supervisors etc]** to better direct their workers to achieve the church’s mission and objectives;
  + Enabling **[leadership/ management/ supervisors etc]** to assist workers to improve performance, identify training requirements and develop skills for career development.

**Performance Planning**

At the beginning of each year, each worker and **[leadership/ management/ supervisors etc]** will create an individual Performance Plan with agreed **[objectives, KPI’s and Development Goals etc]** for the year.

As part of their induction, all new workers will be inducted to the Performance Management process and the skills and development required for their role. Both the plan and review seek to address and support the worker’s current and future performance.

*Setting objectives*

Individual objectives for the coming year will be set annually and should be agreed by the workers and **[leadership/ management/ supervisors etc]**:

* + It is important to understand and align organisational, group and individual goals, timeframes and measures of success – what has to be done and when, and how an individual worker is expected to contribute to these goals.
  + There should generally be no more than 6 - 8 objectives per role.

Goals should provide a standard set of shared and measurable outcomes that are assigned at a group level or individual level.

This approach is intended to develop and establish goal-based criteria (what people achieve, ie output and outcomes) and to identify developmental needs in respect of the key accountabilities and the identified competencies (ie skills, knowledge and experience) for a position.

Goal based criteria focus and improve on key elements of performance by:

* + Clarifying performance goals for the worker;
  + Managing current performance;
  + Motivating workers, especially where goals are challenging.

While objectivity is important, assessment of the level of performance against the performance measurement criteria will also involve a level of judgment. To maximise objectivity, it is crucial that the **[leadership/ management/ supervisors etc]** and the workers discuss and agree upon the criteria that will apply to each major goal/task area.

Some performance criteria are easy to measure while some are not. Work outcomes can be measured in terms of:

* + - Time e.g., meeting deadlines
    - Money e.g., costs, meeting budget requirements
    - Physical units e.g., forms processed, enquiries answered or
    - Quality e.g., accuracy, compliance with procedures

Criteria should take into account the levels that would be achieved by a competent workers.

*Development plan*

The process of setting objectives and both informal and formal evaluation of a worker’s performance, will identify areas where development and training would enhance the worker’s ability to achieve key results and specific objectives.

The position description for a worker’s role also contains a list of capabilities for the position that are useful to reference.

The workers and **[leadership/ management/ supervisors etc]** discuss and agree on development actions for the following twelve months. Actions that are agreed on for development are recorded and documented in an Annual Plan. The **[leadership/ management/ supervisors etc]** will support and coordinate suitable development activities as required.

At the year-end reviews, progress against the development plan is assessed.

The Annual Plan can then be viewed and updated by the workers or the **[leadership/ management/ supervisors etc]** throughout the year as agreed.

*Values*

Alignment of everything that we do, from our work to how we conduct ourselves, to our values is core to what we do.

Measurement of behaviour is highly qualitative and therefore the focus is on development rather than assessment but nevertheless significant variations from our values would need to be addressed.

**Performance review process**

**ABC Baptist Church** encourages informal and formal review processes based on two-wayfeedback and conversation in one-on-ones. These should be grounded in the principles of love, support, and affirmation.

*Informal feedback and coaching*

Informal feedback and coaching through regular one-on-ones should be an ongoing process throughout the year, to enhance open communication and develop a culture of continuous improvement. This enables discussion of progress, development and any performance-related issues in a timely and constructive fashion.

It is expected that **[leadership/ management/ supervisors etc]** will catch up with workers for one-on-ones at least once every months and that these conversations will be documented.

*Formal reviews*

A formal progress review will be conducted annually each year.

The purpose of the formal progress review is to provide an opportunity for feedback to workers on their progress and performance against their objectives and goals of their Annual Plan.

While ongoing reviews through one-on-ones should be carried out regularly on an informal basis by **[leadership/ management/ supervisors etc]**, a formal progress review provides an opportunity to adjust the objectives and tasks and assess the training/development plan.

The annual performance review meeting consolidates the outcomes of the formal and informal review processes that have taken place during the year. Unless an exceptional event has occurred since the last formal progress review, there should be nothing raised that has not already been discussed with the workers. The review should:

* + Encourage open and constructive exchange of views about workers performance
  + Acknowledge good performance and results achieved
  + Assess overall work competence
  + Review the success of workers training and development activities
  + Provide constructive feedback where goals have not been achieved
  + Discuss any feedback on workers performance that may have been received from external stakeholders
  + Explore ways in which workers performance can be enhanced in the future
  + Propose action relating to further workers training and development.

**Conflict and grievance procedures**

In the event that the performance review results in conflict or disagreement it is highly desirable that a mutually acceptable outcome is achieved and that the processes described in the Grievance Policy be followed if necessary.

**Confidentiality**

All records relating to performance management are confidential and these documents will be maintained in the employee’s personnel file.

**Managing under performance**

**ABC Baptist Church** is committed to a fair and consultative process to identify and positively resolve any areas of worker’s work performance or behaviour which require improvement.

**Informal performance management**

Minor issues with performance or behaviour will be discussed with the employee as they occur.

**Coaching**

Coaching for poor performance occurs on the job and means that a **[leadership/ management/ supervisors etc]** and employee talk one-on-one about what they have observed in the workplace, reinforce positive aspects of performance and bring to attention any performance problems whilst they are minor.

The **[leadership/ management/ supervisors etc]** will:

* Talk with the workers so that they are aware their actions are having a negative impact within the workplace
* Ensure the employee clearly understands the relevant actions, processes and standards expected
* Listen to the employee's perspective on the issue in order to demonstrate care for the employee and support them in developing solutions to improve the performance
* Address any reasonable issues the employee has raised that have impacted upon the performance e.g. resources, training
* Regularly follow up on the employee's progress and set a date to review the issues and action them
* Make a diary note listing the nature of the meeting, date and time and any actions agreed upon. This is for the **[leadership/ management/ supervisors etc]** records only.

**Formal performance management**

Where performance below an acceptable standard continues and informal discussion and coaching have not succeeded in raising the employee's work performance, or where a serious breach of standards, policy or procedure has occurred, formal disciplinary meetings will occur. These include counselling and written warnings in cases of serious misconduct or continued poor performance. For further procedures on formal performance management, refer to the Disciplinary Policy.

**Document Control Information**

|  |  |
| --- | --- |
| **Performance Management Policy** | |
| Owner |  |
| Master Copy |  |
| Date created |  |
| Date last reviewed |  |
| Approved by **[Management Team]** |  |
| Approved by **[Governance Group]** |  |
| Date next Review |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Version | Revision Description | Reviewed / Updated by |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |