

Pastoral Reviews & Personnel Policies (Team Ministry with a Lead Pastor)

PART I: Values to Guide Personnel Policies and Procedures

1. To support the health of the Pastors 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 the Pastors and lay leaders, between the 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 a Lead Pastor¹ and [Associate Pastors].
 - a. [*Church Name*] structures its Pastoral Team in a hierarchical/collaborative model. That is, the structure of the team is hierarchical on paper but collaborative in practice.
 - b. The Associate Pastors are accountable to the Lead Pastor. The Lead Pastor is accountable to the Personnel Committee.²

¹ In some congregations, the Lead Pastor is known as the Senior Pastor.

² In some congregations, the Personnel Committee is known as the Pastor-Congregation Relations Committee.

- c. While the Pastors relate and cooperate with one another in a collaborative manner and while all Pastors have decision making authority in their areas of responsibility, the Lead Pastor is given authority to make the final decision in matters where there is an intersection between an Associate Pastor's area of responsibility and the overall health and vision of the congregation.

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.
2. The Lead Pastor maintains responsibility on behalf of Pastors for the overall vision and health of the congregation, engages with the Church Council regarding this vision, and leads in developing a strategic plan with the Church Council for the congregation and its ministries.

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;
 - to manage employment decision procedures, as outlined in this document; and
 - 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 the Lead Pastor. 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 – Associate Pastors

1. Associate Pastors are accountable to the Lead Pastor. The Lead Pastor will meet with each Associate Pastor on a [*monthly/bi-monthly/quarterly*] basis to support him/her, to provide feedback, to set direction, etc. This will also include actively checking in with the Associate Pastor regarding his/her vocational well-being, his/her work-life balance, etc.
2. Each year, Associate Pastors will be asked to identify and share with the Lead Pastor concrete objectives for meeting the expectations of the job, as well as one or more personal goals and two or more professional goals associated with their job description.
3. In situations where an Associate Pastor is encountering challenges in one or more areas of his/her job description, the Lead Pastor, in conversation with the Personnel Committee, will offer one or more of the following by way of support:
 - increased guidance, provided by the Lead Pastor;
 - engagement with a focus group drawn from the congregation;
 - training courses, as appropriate;
 - Leadership/Conflict Coaching provided by a coach external to the congregation; and/or
 - Mentoring provided by an experienced pastor external to the congregation.

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

4. To support the Lead Pastor in his/her team leadership, he/she will receive regular opportunities for leadership training/coaching.

C. Accountability – Lead Pastor

1. The Lead Pastor is accountable to the Personnel Committee. The Personnel Committee will meet with the Lead Pastor on a [*monthly, bi-monthly or quarterly*] basis to support the Lead Pastor, to provide feedback, to set direction, etc. This will also include actively checking in with the Pastor regarding his/her vocational well-being, his/her work-life balance, etc.
2. Each year, the Lead Pastor will be asked to identify and share with the Personnel Committee concrete objectives for meeting the expectations of the job, as well as one or more personal goals and two or more professional goals associated with his/her job description.
3. Pastoral Team members are encouraged to talk directly with the Lead Pastor should affirmations and/or concerns arise with respect to the leadership of the Lead Pastor.
 - a. If members of the Pastoral Team do not feel comfortable talking directly to the Lead Pastor and/or if members of the Pastoral Team have talked directly with the Lead

Pastor and do not feel as though a matter of concern has been adequately addressed, he/she may raise the issue with a member of the Personnel Committee.

- b. If the matter involves conflict, it will be addressed under the “Conflict within the Pastoral Team” policy below.
4. The Personnel Committee will provide the Pastoral Team with yearly opportunities to provide feedback regarding the ministry of the Lead Pastor. These feedback opportunities will be offered by way of survey and/or invitation for personal conversation. The Personnel Committee will use this information to provide feedback to the Lead Pastor regarding his/her ministry.
5. In situations where the Lead Pastor is encountering challenges in one or more areas of his/her job description, the Personnel Committee, in conversation with the Church Council, 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 is related to a matter of ministerial misconduct, it will be addressed under the “Matters of Ministerial Misconduct” policy below.)

6. To support the members of the Personnel Committee in their leadership, regular opportunities for leadership training/coaching will be made available to them.

D. Mentoring

1. In situations where a member of the Pastoral Team is new to ministry, the Lead Pastor will enter into a more intentional mentoring role with this Associate 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 Lead Pastor (and if appropriate, with the lay leaders associated with the new Pastor’s job description), receiving feedback on plans, and evaluating plans following their execution.

E. Relationship Building Meetings with the Personnel Committee

1. In addition to the meetings identified above, members of the Personnel Committee will meet three times per year with each Pastor for the purposes of relationship building, communication, and support. This will include actively checking in with the Pastors regarding the health of the team, their work, etc.

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. (If the Focus Group is for the support of an Associate Pastor, the Personnel Committee may also seek the input of the Lead Pastor.)
 - 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 this survey is not to review specific Pastors.³
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 Associate Pastors 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 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 an Associate Pastor, he/she is welcome to talk with the Lead Pastor. The Lead Pastor will consider the feedback and, if appropriate, will share this feedback with the Associate Pastor, strategizing with him/her how to address this feedback.
 - b. Should a member of the congregation wish to provide feedback regarding an Associate Pastor but does not feel comfortable talking with either the Associate Pastor or the Lead Pastor, he/she is welcome to talk with the Personnel Committee. The Personnel

³ 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 sense, congregation members are being asked to assess where they are healthy already and what areas may need attention.

Committee, together with the Lead Pastor and the Associate Pastor, will strategize together how to address this feedback.

- c. If an Associate Pastor feels unfairly criticized by a member of the congregation, he/she is welcome to talk to with the Lead Pastor and, if necessary, the Personnel Committee. They will strategize together how to address this concern.
2. Similarly, the congregation is encouraged to engage the Lead Pastor 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, the Lead Pastor will seek to receive and engage the congregation's feedback with a spirit of grace and curiosity.
 - a. Should the individual not feel comfortable talking directly with the Lead 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 Lead Pastor, strategizing with the Lead Pastor how to address this feedback.
 - b. If the Lead 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.
 3. For each of the situations in C.1. and C.2. above, the Lead Pastor and the Associate Pastor (and/or the Personnel Committee, as indicated) will consider the matter and, if appropriate, will implement one or more support actions described below.
 - a. The Lead Pastor will offer guidance and/or coaching for the Associate Pastor regarding how to address the issue with the member of the congregation directly. (Or, if the matter involves the Lead Pastor, the Personnel Committee will offer guidance and/or coaching for the Lead Pastor.)
 - b. The Lead Pastor will dialogue directly with the member of the congregation to hear the member's concern and to determine appropriate next steps. This may include encouraging the member of the congregation to modify his/her approach to the Associate Pastor. (Or, if the matter involves the Lead Pastor, the Personnel Committee will dialogue directly with the member of the congregation.)
 - c. The Lead Pastor will facilitate dialogue between the Associate Pastor and the member of the congregation. (Or, if the matter involves the Lead Pastor, the Personnel Committee will facilitate dialogue between the Lead Pastor and the member of the congregation.)
 - d. Together, the Lead Pastor and the Personnel Committee, in conversation with the Associate Pastor, may engage an external consultant or the Conference Minister to support them in addressing the situation by offering an assessment of the situation, coaching, mediation, etc. (Or, if the matter involves the Lead Pastor, the Church Council Chair may engage external supports.)

(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 Sections A, B & C of Part V 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 lead the review process for all Pastors. Before commencing a substantial review for a Pastor, the Personnel Committee will contact area conference to seek resources on guidelines and best practices for conducting such reviews.
3. The Personnel Committee will provide the congregation with an opportunity for a more substantial review of their Pastors after the 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.
4. Throughout this process, the Personnel Committee will maintain enhanced communication with the Pastor being reviewed, the Lead Pastor, and the Church Council Chair. At any step of this process, members of the Personnel Committee may draw on the Church Council Chair and/or the Lead Pastor should they require increased support, encounter questions they cannot answer, etc.
5. Opportunities to provide feedback for the Pastor's review will be made available by way of a survey to the whole congregation, as well as the Pastoral Team and staff.⁴ In addition, Discussion Groups will be called to allow for conversational feedback regarding the same questions posed in the survey. (Note: Pastors and staff are also expected to submit survey responses.)
6. The Personnel Committee will provide the congregation with a statement regarding the ministry position they are reviewing. The Personnel Committee, the Pastor being reviewed, and, if the review is for an Associate Pastor, the Lead Pastor 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 govern 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).
7. Surveys and Discussion 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

⁴ 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.

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.

8. 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.
9. The survey will include a poll⁵ 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...
 - c. I do not support the ongoing ministry of this Pastor at [*Church Name*] for the following reasons...
10. The Personnel Committee will collate feedback from the survey and the Discussion Groups. The Personnel Committee will consult with the Conference Minister on guidelines regarding how to interpret and present data gathered during the review.
11. The Pastor will not receive raw data/comments. Instead, the Personnel Committee will develop a summary document to be shared with the Pastor.
12. The Personnel Committee and the Pastor being reviewed (and the Lead Pastor, if the Pastor being reviewed is an Associate Pastor) 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 (and the Lead Pastor, if the Pastor being reviewed is an Associate Pastor) 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, in dialogue with Church Council, will strategize together how to proceed. Options include the following:
 - developing a plan to address the concerns raised by the congregation, which will be shared with the congregation; or
 - 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.
 - 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 will be alerted as this is typically an indicator of broader ill-health in the congregation.

⁵ 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.

- Should such a situation occur, the Pastor, the Personnel Committee, and the Church Council will consider next steps, which may include developing a plan to address concerns raised by the congregation, improving the “internal marketing” of 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.
13. 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 invests authority in the Personnel Committee and the Church Council to make employment decisions with regard to Pastors according to the process described below.
2. As indicated in Part V above, 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 the Pastor in dialogue regarding this feedback. As a part of this dialogue, the Personnel Committee (along with the Lead Pastor in the case of Associate Pastors) and the Pastor will pay attention to questions of ongoing fit between the Pastor and the congregation.
3. One year following each substantial review, the Personnel Committee (along with the Lead Pastor in the case of Associate Pastors), the Church Council, and the Pastor will engage in an intentional conversation regarding the ongoing fit between the Pastor and the congregation, taking into account actions the Pastor has taken to address feedback received from the Personnel Committee, the Pastoral Team, and the congregation to date. The outcome of this conversation may 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 take further action to address feedback received from the Personnel Committee (along with the Lead Pastor in the case of Associate Pastors), the Church Council, 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 the contract.
4. The Personnel Committee and the Church Council will advise 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 at Step 3, the parties to the dispute may meet with the Lead Pastor or, if one of the parties is the Lead Pastor, 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 area conference.

- Together with area conference, the Personnel Committee will discern how best to proceed.
- The Personnel Committee, with 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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