



Staff Evaluations Four Approaches

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Among the most important responsibilities of a synagogue board is the obligation to evaluate its professionals regularly. Because leading the congregation is a shared task, the governing body of the congregation not only should review the staff, it should engage in regular self-review as well.

Many congregations conduct an annual review, which is a vital tool in gauging its professionals' performance, but a once-a-year review is not enough. We also must pay attention to what happens between reviews. We suggest that representatives of the congregation meet with the professionals at least at every six months as well as at year's end for reflection and recommendations. A midyear evaluation provides synagogue leaders and staff with the opportunity to check in with one another and discuss progress toward goals, performance and achievements. It gives the professionals much-needed feedback about their progress toward established benchmarks and alerts the board to areas where support and professional development might be needed.

The evaluations are more than a report card. They should serve as an opportunity to create an atmosphere of reflective leadership. At the same time, the board and its committees also should spend time reviewing their goals and leadership and partnership styles. In the spirit of working together as a true team, it is important to create an atmosphere that allows staff to offer a review of lay leadership.

The United Synagogue's Synagogue Resource Center does not provide evaluation forms. This is not an oversight. Job descriptions and performance expectations vary greatly from community to community, so it would be difficult – if not impossible – to create a one-size-fits-all form. Instead, we offer suggestions for you to use to create your own evaluation tool. Member congregations may contact district offices and our central program development office to get further assistance in creating an evaluation tool that works for you. We recommend the booklet *Putting the Partnership Under the Microscope: The Process of Review & Assessment of a Congregation's Professionals and Leadership*, available at <http://uscj.org/congservices/forms/Synagogue%20Assessment%20Tools/PartnershipUnderMicroscope.pdf>

We offer four formats you can use as you can build a review system for your congregation. While the basic purpose of these models is for board review of the professional staff, each can be adapted for review of staff by those in supervisory positions.

The Regular Check-in

Rabbi William Lebeau, former vice chancellor of the Jewish Theological Seminary, encourages rabbis and synagogue leaders to engage in a monthly check-in review. The conversation centers on three questions that serve as a basis for specific feedback on nature and quality of work being done:

1. Which of my duties do you want me to enhance and expand?
2. What am I doing that is not working?
3. Which of my duties do you feel I am doing well and at the appropriate level?

These questions are answered by both the professional and lay leaders and are used as a basis for continuing discussion.



Progress Assessment

A simple process to begin a formalized review focuses on three basic questions.

1. Consider what the staff member is doing: what is worth keeping and enhancing? (This starts the review on a positive note, affirming the good things that are happening.)
2. Consider what the staff member is doing: what should be avoided? (This identifies problem areas and potential challenges that need remedial measures.)
3. Where should the staff member focus? That is, what are the staff member's dreams and hopes for the congregation? (This closes the review on a positive note, pointing to the future and its dreams.)

The board, major committees, and key staff should provide a minimum of three and no more than five responses for each question. The review process entails discussing the answers and choosing plans to pursue during the next period of time.

Performance Review

A more formal approach begins with both staff and lay leaders preparing answers to the following questions before the meeting. The discussion focuses first on the areas where all agree and should continue with a review of areas where views differ. The questions to be addressed are:

1. What have been the professional's top three accomplishments since the last discussion?
2. In which three areas does the professional excel?
3. In which three ways has s/he has helped the synagogue reach shared goals and achieve its mission?
4. In which three areas would we like the professional to focus for enhancing his/her performance? [lay] In which three areas would the professional like to focus for enhancing his/her performance? [professional]

After discussing these questions, continue by establishing next steps, which should be three well-defined, concrete steps toward growth.

Values-based Review

Another approach is to list the congregation's values based on its mission statement, and rate the professional's performance in relation to them. The values may include:

1. In-reach to members.
2. Outreach to nonmembers.
3. Teamwork with other staff.
4. Teamwork with board.
5. Initiative and entrepreneurial spirit.
6. Innovation in services provided by synagogue.
7. Openness to personal development and growth.
8. Teaching and living the values of Conservative Judaism.

Rate each area on a scale from "Falls below expectations" to "Exceeds expectations." This tool should be used as a beginning for discussion, not as grades. Focus first on areas that exceeded expectations, and conclude with concrete suggestions for ways to deal with areas that fall below expectations. Create a mutually agreeable schedule for meeting these goals.

A well constructed, regular pattern of review will yield benefits for all parties. Good communication leads to a better understanding, and an effective evaluations with honest sharing and feedback can set the stage for continued growth and development.

