

Church Secretary's Communique

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Rox - I copied this. you might want to use it someday. sorta neat. *Paul*

A guide for self-evaluation

Evaluating Your Work as a Church Secretary

Studies indicate that employees want to know how they are doing. Many companies have an annual performance evaluation for some employees. While this meeting may create tension for some people, when it is done in a thoughtful way, it can enhance both performance and relationships within the workplace. In this issue, we will examine some issues related to work evaluations of church secretaries.

Four Reasons To Do An Evaluation

Evaluations can be done for a variety of reasons including the following: (1) for improvement; (2) to make changes; (3) to assess performance; or, (4) to solve problems. While people are most familiar with performance evaluations, let's briefly look at each reason.

1. Improvement. An evaluation can help identify areas that need improvement. The focus is not solely on individual performance, but upon how the entire work environment functions. For example, an evaluation may indicate that the communication between the pastor and secretary needs to be improved, or that for work to improve, new equipment is needed.

2. To Make Changes. An evaluation can be done to determine if policies, procedures, and performance are adequate, or if changes need to be made. For example, can the secretary do all the assigned work in the time available, or is additional help needed? What changes, if any, need to be made so that work is satisfactorily completed?

3. To Assess Performance. Often, evaluations are done six months after an employee begins to assess progress, clarify needs, and alter procedures if necessary. Performance appraisals then reoccur on an annual basis, where both boss and employee give feedback to each other with the goal of enhancing employee effectiveness.

4. To Solve Problems. Sometimes an evaluation will be initiated to solve a problem. The focus is to identify the causes of and possible solutions to the problem.

The tools in this issue can help you begin a self-evaluation. Take time to complete the rating scales found on the following pages. You may want to do them solely on your own, or with the assistance of your boss.

Once completed reflect on your findings in light of the four reasons for doing an evaluation. And then, best wishes for your personal growth for this new year of 1998!

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Practical Application

How to Use the Rating Scales

1. After you have completed the self-appraisal scales, make a list of those work areas that you have determined need improvement.

2. Subdivide your list into the following categories:

- improvements that can be made on my own;
- improvements that will require the cooperation or assistance of my boss;
- improvements that will require the cooperation of church members;
- improvements that will require new or additional equipment;
- improvements that will require a redefinition of my responsibilities or authority;
- improvements that will require further training or education.

Some of the areas on your list may fall into more than one category.

3. Develop a plan for personal growth.

(a) Start with areas that you can improve on your own. Identify what changes you can make that will lead to personal performance improvement.

(b) Identify what you consider to be three or four other work areas in which you want to see improvement, but which require outside assistance (the last five bullets in the list above). Discuss with your boss why you believe such improvements are important, and together identify how such improvements might occur.

4. Remember that self-assessment should not be confused with self-worth. While a person who does well at work can develop positive feelings of personal achievement, we must always recognize that God loves us not on the basis of what we do, but accepts us and receives us as we are.

Seven skill categories for self-analysis

Tools for Performing A Self-Evaluation

The following scales divide the secretary's job into seven skill categories: (1) clerical skills; (2) communication skills; (3) human relation skills; (4) ministry skills; (5) organizational skills, (6) technical skills; and (7) accounting skills. The scales are designed to be used in a personal self-evaluation with respect to each category (consider such factors as attitude, effort, knowledge, accuracy, flexibility and productivity). Complete the sections applicable to your work.

I. Clerical Skills

	Excellent	Satisfactory	Improvement Needed		
1. Filing	1	2	3	4	5
2. Typing	1	2	3	4	5
3. Taking dictation	1	2	3	4	5
4. Handling the telephone	1	2	3	4	5
5. Writing	1	2	3	4	5
6. Following instructions	1	2	3	4	5
7. Using office equipment	1	2	3	4	5
8. Maintaining church calendar	1	2	3	4	5
9. Overseeing petty cash	1	2	3	4	5
10. Scheduling appointments	1	2	3	4	5
11. Disbursing and keeping track of church keys	1	2	3	4	5
12. Taking minutes	1	2	3	4	5
13. Typing financial reports	1	2	3	4	5
14. Typing annual reports	1	2	3	4	5
15. Maintaining membership records	1	2	3	4	5
16. Preparing church directory	1	2	3	4	5
17. Handling mail	1	2	3	4	5

II. Communication Skills

A. Collecting Information

1. Collecting information from church staff					
(a) about my work	1	2	3	4	5
(b) about their schedule	1	2	3	4	5
(c) for bulletin/newsletter	1	2	3	4	5
(d) for church calendar	1	2	3	4	5
2. Collecting information from ministry leaders					
(a) for bulletin/newsletter	1	2	3	4	5
(b) about tasks they want me to do	1	2	3	4	5
(c) for church calendar	1	2	3	4	5
3. Collecting information from congregational members					
(a) for directory—names, address, phone, etc.	1	2	3	4	5
(b) other—births, deaths, baptisms, confirmations	1	2	3	4	5
(c) for bulletin/newsletter	1	2	3	4	5

B. Storing Information	Excellent	Satisfactory	Improvement Needed		
1. Filing system	1	2	3	4	5
2. Phone messages	1	2	3	4	5
3. Calendar	1	2	3	4	5
4. Building use	1	2	3	4	5
5. Things to do	1	2	3	4	5
6. Record keeping					
(a) hospital	1	2	3	4	5
(b) church keys	1	2	3	4	5
(c) borrowed property	1	2	3	4	5
(d) church finances	1	2	3	4	5
(e) congregational giving	1	2	3	4	5
(f) membership	1	2	3	4	5
(g) minutes	1	2	3	4	5

C. Disseminating Information

1. Congregation					
(a) church bulletin	1	2	3	4	5
(b) church newsletter	1	2	3	4	5
(c) bulletin boards	1	2	3	4	5
(d) church directory	1	2	3	4	5
2. Public Service					
(a) newspaper	1	2	3	4	5
(b) radio	1	2	3	4	5
(c) television	1	2	3	4	5
3. Boss/staff					
(a) staff meetings	1	2	3	4	5
(b) memos	1	2	3	4	5
(c) written messages	1	2	3	4	5
4. Ministry Leaders					
(a) general communication	1	2	3	4	5

D. Follow-Up

1. I stay up-to-date on church activities	1	2	3	4	5
2. I regularly touch bases with my boss	1	2	3	4	5

III. Human Relation Skills

1. Greet visitors in a friendly manner	1	2	3	4	5
2. Maintain pleasant telephone voice	1	2	3	4	5
3. Maintain confidentiality	1	2	3	4	5
4. Screen telephone calls	1	2	3	4	5
5. Screen access to boss	1	2	3	4	5
6. Stay calm in an emergency	1	2	3	4	5
7. Work well with others	1	2	3	4	5
8. Show empathy	1	2	3	4	5
9. Control emotions	1	2	3	4	5
10. Ability to be assertive	1	2	3	4	5

IV. Ministry Skills

1. Pray with others	1	2	3	4	5
2. Respond to transients	1	2	3	4	5
3. Ability to make referrals	1	2	3	4	5
4. Discern needs	1	2	3	4	5
5. Ability to encourage others	1	2	3	4	5
6. Knowledgeable about the church's mission	1	2	3	4	5

Reducing anxiety

A Note to the Boss

Normally, the boss is involved in the performance appraisal involving his or her secretary. Below are a few basic guidelines that can help reduce the anxiety that a performance appraisal may cause.

1. Determine in advance the purpose of the appraisal. Is it to plan goals, to review salaries, to identify training needs, to improve performance, to evaluate procedures, a combination of the above, or for some other reason?

2. Clarify the basis for the appraisal in advance.

Example: *Pastor Green and Jan, the church secretary, look over the enclosed rating scales together. The section on public service advertising catches Pastor Green's attention. "Jan," Pastor Green says, "Sarah (the former secretary) always put information in the newspaper about our special services. That's really something you should be doing too."*

The point is that Jan can only be expected to give information to the newspaper *if* she is told in advance that it is part of her responsibilities. The performance appraisal may assist, however, in helping to identify needs that require future attention. As a result, the secretary's responsibilities may undergo some redefinition.

3. Provide opportunity for the secretary to give input and feedback. A performance appraisal should not be a one-sided event. Both pastor and secretary need an opportunity to share their thoughts and feelings. Not only does this make the process more fair, but it strengthens the working relationship. Open communication and cooperative problem solving are keys to personal growth and enhanced job performance.

4. Make the appraisal a planned, routine event. Don't conduct an appraisal as a knee-jerk reaction to problems. That approach increases tensions and anxieties. Rather, conduct

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V. Organizational Skills

	Excellent Needed		Satisfactory		Improvement
1. Break down complex tasks into manageable smaller tasks	1	2	3	4	5
2. Organize work	1	2	3	4	5
3. Maintain adequate office supplies	1	2	3	4	5
4. Set up procedures to collect, store, retrieve, and disseminate information	1	2	3	4	5
5. Ability to recruit, train and use volunteers	1	2	3	4	5
6. Ability to organize office layout for efficiency and effectiveness	1	2	3	4	5
7. Ability to make decisions	1	2	3	4	5
8. Ability to assess needs, identify goals, implement plans, and assess outcomes.	1	2	3	4	5

VI. Technical Skills

1. Ability to use church equipment	1	2	3	4	5
2. Ability to diagnose problems and make routine repairs on equipment	1	2	3	4	5

VII. Accounting Skills

1. Understanding of basic accounting principles	1	2	3	4	5
2. Maintain a general ledger	1	2	3	4	5
3. Prepare financial statements	1	2	3	4	5
4. Maintain giving records	1	2	3	4	5
5. Prepare federal and state tax forms	1	2	3	4	5

The Boss
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performance appraisals on a regular basis such as once a year.

5. Work at reducing defensiveness. Many employees will naturally be defensive concerning any kind of appraisal. They anticipate being told what they do wrong, which in turn has a direct negative impact on their self-esteem. But if the appraisal time can have a positive focus, and is viewed as a time for sharing ideas, reviewing goals, solving problems, and providing mutual feedback, the outcomes can be very positive. Therefore, the boss should work at shaping expectations for the performance appraisal as a time for personal growth rather than as a time for personal judgment.

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