

ANNUAL REVIEWS

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Does your church hold annual reviews? If not, then you should pursue the idea! The annual employment review, or performance appraisal, is an important tool we musicians have to assess our standing with our employing church or synagogue. Think of the review as a conversation between you, the musician, and your employer—a conversation for which both have prepared. Admittedly some, whether employee or employer, get anxious about the prospect of an annual review, but both sides can take steps to make it a positive experience.

The AGO's National Committee on Career Development has put together guidelines to aid in preparing for a review. The guidelines summarize the review process and provide sample questions and forms that can be tailored to your individual situation. These guidelines can help if you are in a church or synagogue that already conducts annual reviews, or if you want to work with your employing institution to develop a review format.

Why an annual review?

Ideally, the annual review should be the culmination of a year's worth of ongoing formal and informal interactions between the musician and other staff, committees, and members of the congregation. The evaluations and feedback of an annual review are most useful when there are no surprises. For both the musician and the institution, the review offers an assessment of the musician's work in three key areas: people skills and working relationships, music and worship skills, and business and administrative skills. For the institution, the review provides essential information for the budget process in support of the music program.

What is a review?

An employment review is, essentially, a communication tool. An annual review, along with frequent intervening communications, can help foster good relationships among the musician, the clergy, and the congregation. It can also act as an early warning of potentially serious problems. When AGO profes-

sional concerns committees are presented with conflicts between a musician and the clergy or congregation, often the underlying problem is a lack of communication.

Part of the review process is to set goals for a coming period of time, so that the next year's review becomes an opportunity to go over previous goals and accomplishments. On a more administrative level, the review can aid both the musician and the institution in short-term and long-term planning; for example, in planning services or musical activities, or making organizational changes. The review is also a good time to take stock not only of people but also the facilities of the institution as they relate to the overall music program.

What helps the review work?

Behind the review are some key assumptions about the relationship between the musician and the church or synagogue that are crucial to the review's success:

- you have a current contract and job description;
- there is a certain level of trust between the parties, so both can be open and honest;
- the institution recognizes that music is an integral part of its overall ministry.

What is the process?

Most commonly, the review process begins with a written form with questions or statements related to the musician's job. Both the musician and the reviewer complete their own copies of the same or similar form in advance of a scheduled review meeting. The review form does not need to be lengthy, nor the questions highly detailed, but it should cover the major categories of the musician's work. To help in crafting a review form, the guidelines offer topics and sample questions as well as a model form that are to be adapted to the employing church or synagogue's own situation.

At the review meeting, the musician and reviewer go over each other's forms, noting agreements, differences,

and information that one person may have included but the other didn't. What follows should be a frank, candid discussion covering areas of strength as well as areas needing further development or improvement. This is also when, ideally, both parties can discuss their working relationship with each other and how it might be strengthened.

An important part of the review meeting is to discuss and agree upon goals for the coming year, and plans or ways to accomplish them. While most of the focus for the goals will be on the musician, this is also an opportunity for the reviewer, as a leader or representative of the church or synagogue, to take on goals that will strengthen the relationship between the musician, the ministers, and the institution.

During the meeting it is important that both parties take notes. These are not only a record of the conversation, but they become the basis for consolidating comments of the musician and the reviewer onto one form. After the consolidated form is prepared, the musician and reviewer sign it, and copies are made for each other.

More about the meeting!

The review meeting is to be dedicated to the review—it is not a quick lunch at the local diner! The meeting should be held in a place that offers complete privacy, with the expectation that there will be no interruptions—no phone calls, no beepers, no cell phones, no intruding administrators.

Who is your reviewer?

The AGO Career Development Committee, in preparing the guidelines for reviews, can speak only in general terms, and the guidelines will need to be tailored to differing situations. This is particularly so with regard to religious institutions, which abide under a range of governing models or policies. Whereas in most business organizations a fairly clear set of working relationships defines who will review which employees, this may vary widely in a church or synagogue. For example, your reviewer could be the head minister, the director of music, or the chair of the music committee or the personnel committee. If your employing institution does not now conduct personnel reviews, you will need to work with both the lay and ministerial leaders to develop a process. That process should reflect the true working and authority relationships within the institution, and within its governing structure.

Reviews take thought, time, and preparation, but in the end they are worth it. Reviews can help build good working conditions and maintain good working relationships. They can also strengthen our position as professionals, as well as further our careers and lead to advancement.

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AMERICAN GUILD OF ORGANISTS

ANNUAL EMPLOYMENT REVIEW FOR CHURCH/SYNAGOGUE MUSICIANS

These guidelines for an annual employment review for musicians are intended to serve as a starting point for developing a review format that fits the local congregation. Individual practices in church/synagogue government and personnel supervision will determine elements of the review, as will denominational guidelines, if available.

An annual review will be only one of a year's worth of informal and formal evaluations, staff and committee meetings. Feedback is most useful when there are no surprises at the employment review. Ideally, the review time is predominantly positive. All evaluations should be in writing and signed by the musician and reviewer, with copies for the institution and the musician.

We cannot overstate the importance of the annual employment review. In fact, it provides essential information for the budgeting process. These guidelines cover the facts of the process and present sample questions in major categories of the musician's work:

- people skills and working relationships
- music and worship skills
- business and administrative skills

These are followed by a sample form that may be adapted for individual use.

Introduction

The AGO recommends an annual review:

- to foster good relationships among musicians, clergy, and congregations
- as a communication tool
- as an opportunity to review goals and accomplishments
- to aid in short-term and long-term planning
- as a time to take stock, not only of people but also of facilities

The Review Process

Reviews:

- assume the existence of a contract and job description.
- include a review of the job description to make sure it matches current responsibilities.
- recognize that music is an integral part of the overall ministry of the institution.
- assume a level of trust between the parties so both can be open and honest.
- are two-way, with input from the person reviewing and the person being reviewed.
- address the areas that comprise the musician's job: people skills/working relationships; music/worship skills; business/administrative skills.
- allow the person being reviewed the opportunity to share what s/he considers to be significant accomplishments of the past year.
- are timed to coincide with the end of the program year to allow for development of next year's program.

Look at the previous year's review. Have you met the goals you set last year?

SAMPLE QUESTIONS IN MAJOR CATEGORIES OF THE MUSICIAN'S WORK

People Skills/Working Relationships

Which areas do you feel are your strengths and which areas need improvement?

- Relationships with clergy and other staff; considering the size of the staff, separate questions may be required for each.
- Relationships with and supervision of other music staff, paid and volunteer.
- Planning for worship and other activities:
 - How frequently do you meet with others involved with planning?
 - Is it enough?
 - Do you need more?
- Relationships with choirs:
- Level of satisfaction, support?
- Recruitment and response?
- Ministry, including awareness of and response to personal situations affecting individuals in choirs?
- Relationships with congregation:
- Level of satisfaction, support?
- Providing opportunities for education and outreach?
- How do you see your "musical fit" with the congregation?

What were your accomplishments in these areas during the past year? What specific goals do you have for the coming year?

Music/Worship Skills

Which areas do you feel are your strengths and which areas need improvement?

- Your level of preparation and practice for rehearsals and services?
- The variety of music experiences that you provide?
- Your ability to adjust to the changing character of the staff or congregation?
- Your development of musical resources in the church?
- Your professional development?
- Are you given enough time and monetary support to do your job properly?
- The leadership that you give in vocal and choral training?
- Your knowledge of hymnody and your ability to lead the congregation in hymn-singing?
- Your knowledge of the liturgy and worship traditions of this faith?

What were your accomplishments in these areas during the past year? What specific goals do you have for the coming year?

Business/Administrative Skills

Which areas do you feel are your strengths and which areas need improvement?

- Your ability to plan, defend, and work within a budget?
- Meeting deadlines for newsletters, worship bulletins, etc.?
- Your stewardship of the church's music and maintenance of the music library?
- Care and maintenance of instruments?
- Meeting contractual and licensing obligations?
- Hiring other musicians such as substitutes and instrumentalists?
- Planning concerts and other special programs with the attendant publicity?
- Necessary custodial work?

What were your accomplishments in these areas during the past year? What specific goals do you have for the coming year?

MODEL ANNUAL EMPLOYMENT REVIEW FOR CHURCH/SYNAGOGUE MUSICIANS

*The following form provides guidelines only.
Users are encouraged to adapt and reformat
this form to serve their own needs.*

Name and Position Title _____

Date hired _____

Review period _____

Date of last review _____

The following items are to be completed by the musician:

1. Does your current job description/contract adequately match the work you are required to do? If not, how should the job description be changed?
2. What have been your accomplishments and successes in the past year?
3. Are there any particular aspects of your work that you especially enjoy or find rewarding? If so, what are they?
4. Are there any particular aspects of your work that you do not especially like? If so, what are they?
What changes would you like to see with regard to these concerns?
5. Is there any way the clergy-person/(appropriate supervisor) could be of better help to you in your work? If so, please describe.
6. Is there any way your fellow staff members and lay leadership could be of better help to you in your work? If so, please describe.
7. What goals would you like to set for yourself for the next year?
8. In general, how would you evaluate your performance over the past year? To what extent were last year's goals met?
9. Is there anything in particular you would like to discuss with the clergy-person/reviewer? If so, please describe.

MUSICIAN _____

The following questions are to be completed by the clergy-person/reviewer:

1. Does the current job description/contract adequately describe the work expected of the musician? If not, how should the job description be changed?
2. In general, what is your evaluation of the musician's performance over the past year? To what extent were last year's goals met?
3. Has the work been done in a manner that facilitates good relationships on the part of coworkers? If not, what improvements should be made?
4. What goal(s) do you set for the musician for the next year?
5. Evaluate how well the musician interacts with choir members and members of the congregation.
6. If applicable, evaluate how well the musician supervises the work of others.
7. How could you be of better help to the musician?
8. Is there anything in particular you would like to discuss with the musician? If so, please describe.

CLERGY-PERSON/REVIEWER _____

The musician and the clergy-person/reviewer are to meet and discuss the comments on the previous pages. After the conversation, each should respond to the following questions:

What goals have been set for the musician for the next year?

Has this evaluation process been beneficial to you? If not, how could it be improved?

MUSICIAN'S RESPONSE:

REVIEWER'S RESPONSE:

MUSICIAN'S SIGNATURE

REVIEWER'S SIGNATURE

DATE