The Coaching/Equipping Team Process for Professional Development

WHY A COACHING/EQUIPPING TEAM PROCESS?

How do we equip the professional development of pastors and other church staff? How do we evaluate? How do we deal with expectations? The Coaching/Equipping Team approach is based upon a model described by Kennon Callahan in Chapter 13, "A Constructive Perspective," and Chapter 14, "The Evaluation Process," in his book, *Effective Church Leadership: Building on the Twelve Keys*.

Callahan points out:

"The purpose of evaluation is not simply evaluation. The central purpose of evaluation, in any vocation, is to grow forward the capacity for self-evaluation…. Evaluation consists of two aspects: self-evaluation and consultation….Self-evaluation is rigorous and thoughtful, honest and intense, specific and constructive. Honest self-evaluation is not sentimental or platitudinous. It is not ego inflation, not "what a good boy am I." Thoughtful self-evaluation is not an exercise in self-flagellation, self-deprecation, defeatism, or ego deflation. Self-evaluation is a realistic assessment of one's own current competencies."[1]

Callahan goes on to reveal the problems of "Top-Down Evaluation," the system many churches use for their personnel process, if they have an evaluation system at all. These include low morale among the persons being evaluated, and the fact that the way people are evaluated shapes who they become. Top-Down evaluation compares the person being evaluated against an *ideal* that may not represent reality in the circumstance.

Callahan maintains this type of evaluation "simply has no constructive purpose." While Top-Down Evaluation may expect the person to do a self-evaluation, the evaluatee is never invited to initiate the process for the purpose of feedback and coaching by the committee charged with doing the evaluation. This type of self-evaluation tends to be defensive or passive, not proactive. Callahan presents the following as a Key principle on page 185: **"The evaluation process of an organization develops the nature of leadership in the organization. To change the nature of leadership, one must change the evaluation process."**

Callahan contrasts top-down evaluation with consultative evaluation—which we call the Coaching/Equipping Process in the Presbytery of Donegal. In this presbytery we are committed to development of healthy, resilient, productive staff and pastors. We often call the process of becoming

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[1] *Effective Church Leadership: Building on the Twelve Keys* , Kennon Callahan, Jossey-Bass, 1997, p 192

more healthy, resilient and productive "leveling up," which refers to making progress and gaining experience levels – the term comes from gaming theory.

In this presbytery, we want to be like Milton Erickson, the founder of a field called Narrative Therapy. Erickson is described as someone who *"fully and palpably believed that there was something unique and wonderful about every human being. When he asked a question, he would await its answer with an air of delighted expectation -- with a twinkle in his eye, an encouraging grin, and great patience. You just knew that any person he asked was going to come up with a wonderful answer, something different from what anyone could have predicted. Erickson saw people as resourceful. He believed that we are all lifelong learners, and that life is an adventure in which we never know what is around the next bend, but whatever it is, it's going to be interesting, and we can probably handle it, and we will learn and grow and enrich our lives by handling it."[2]*

ESTABLISHING THE COACHING/EQUIPPING TEAM

The Coaching/Equipping team will generally be composed of 3-6 people. Usually, the pastor or pastors who are the Head of staff and a member assigned by the committee responsible for personnel matters are on each team. There should be session representation on the team for pastors. It is important that those on the team are there to be coaching and not correcting. They should be people with whom the staff member has a mutual trust, respect, and confidence. They should be committed to praying for the staff member, and should be people who want the staff member to succeed. They need enough self-differentiation that valued relationship will not get in the way of sharing wise consultation. Confidentiality is key. Those with an "agenda" will not be of help and should not be on the team.

Callahan says wise consultation is more than one side giving advice and the other side listening. Advice tends to be a series of tired, tidy slogans. Wise consultation draws out the best thinking and prods to expand your horizons of thought. Wise consultation is searching, puzzling, mutual and collaborative.

FIRST STEPS: EXPECTATIONS AND WELLNESS

1. **Establish the Position Description**
   An effective working relationship begins with clear expectations. Each staff member should have a position description that describes what they are expected to do, and how they are expected to accomplish it. Sometimes there may be a position description naming essential job functions, and a task list detailing what is involved in each job functions. Position descriptions might include common performance factors that each staff member is expected to fulfill. Position descriptions should be reviewed regularly to make sure they are accurate and achievable.

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[2] Narrative Therapy: The Social Construction of Preferred Realities 1st Edition, Gene Combs and Jill Friedman, W. W. Norton & Company; 1996, p 10

2. **Name "Un-named Expectations"**

   When presbytery staff, pastors and other church professionals begin new positions, the organizations has many expectations that the new staff member knows nothing about. Often, the way expectations surface is when they have been violated. This can be an occasion for conversation and good humor. When expectations are not named, it may be the beginning of conflict down the road.

   The presbytery process *Expectant Conversations: Preparing for a Good Future* provides some ideas for talking together about expectations. Talking about expectations is an excellent step when a new pastor or staff member is beginning a position. But such conversations are a good idea all of the time. It is never too late to have a robust conversation about expectations.

3. **Establish How Records Will Be Kept and Shared**

   The Presbytery of Donegal uses a collaborative spreadsheet known as Smartsheet as the method for tracking work plans and sharing them collaboratively. We recommend it for congregations! Whatever method is going to be used should be clearly established and communicated.

4. **Encourage a Plan for Personal Wellness and Resiliency**

   People thrive when they are practicing wellness, and have developed skills for respond to challenges. Workplaces thrive when the staff they employ are practicing "good enough" wellness and resiliency. All staff members can be encouraged to take steps to improve and maintain personal wellness. Coaching/Equipping Teams are not responsible for the personal lives of staff members, and yet there are many ways to encourage development in this area. Some of them involve cultivating habits of gratitude, play and calm as a community, listening to what is life-giving and life-draining that staff members choose to share, and encouraging healthy boundaries between the workplace and personal life.

ESTABLISHING THE WORK PLAN

1. **Identify Three - Four Major Key Objectives**

   Using information from the position description and with identified expectations in hand, the staff member identifies major key objectives for focus over the next 3-6 months. In the presbytery, these are listed on the staff member's Work Plan Smartsheet. If these objectives are not clear to the staff member, then the team assists in bringing forth the objectives. There are three major areas for key objectives:

   a. **Project Management Objectives**

      Project Management Objectives identify a specific ministry area to move forward. Examples might be: "Establish a Midweek family night" or "Begin a Visitation Team." These objectives are next steps in moving forward the vision and strategy of the congregation.

b. **Skill Development Objectives**

Skill Development objectives identify a specific skill to advance or new competencies to acquire. Examples might be "Develop Preaching skills in an more narrative style" or "Learn how other congregations practice stewardship development." Skill Development objectives are often a first step for Project Management Objectives.

c. **Character Development Objectives**

Character Development Objectives identify specific areas to improve in order to address work performance issues. These are often the most difficult areas to talk about, and yet are often the ones that most affect work performance and life together. Since all of us need to grow, it is possible to establish these objectives with safety, respect, and encouragement. Examples might include "Meet established deadlines for bulletins" or "Arrive on time for work each day" or "Greet at least 25 people each Sunday."

While the team can help in midwifing the major key objectives, it is important that the staff member "own" these objectives as self-chosen, rather than imposed by the team. If the team believes there are issues the staff member must address, then implementing the practices of listening, conversation and forbearance would be the next step to arrive at mutual concurrence.

If there still is not a match, then next steps might involve bringing in an external facilitator if the differences are in expectations, or by documenting deficient work performance and moving to remedial goals with written warnings and other steps to address unsatisfactory work performance.

2. **Develop Four - Six Action Steps for Each of the Major Key Objectives**
Each Action Step should be one specific step that can be taken to advance the major key objective. The action steps ensure wise planning that follows these principles:

1. Written down
2. A strong sense of ownership
3. Specific and measurable
4. Reflecting realistic time horizons
5. Concrete and achievable
6. Complementary & mutually reinforcing

3. **Develop One Technical Skill Advancement Key Objective**
Identify one Technical Skill Key Objective. Examples might be "Learn Prezi" or "Learn more about Robert's Rules of Order." Follow the same process with action steps.

4. **Develop One Life Enhancement Key Objective**
Identify one Life Enhancement Key Objective. Examples might be "Exercise for at least half an hour five times per week" or "Plant an herb garden."

5. **Develop Any Needed Remedial Goals**

   While this process is designed to equip the staff member for success, there are times that an important key objective will not be achieved, and more accountability is needed. When this happens, the staff member may exercise maturity and propose a Remedial Goal for more focused attention in the next goal cycle. A Remedial Goal may also be imposed by the Coaching/Equipping team. The action steps for the Remedial Goal should include how progress will be monitored, and how the Remedial Goal will be satisfied.

   Remedial Goals are an important step to work for improvement prior to actions with more severity, such as issuing a written warning, placing an employee upon probation, suspending the employee or moving towards termination. Remedial Goals can be painful, but they can also be effective in helping a staff member to advance towards desired outcomes.

PREPARE THE SYNOPSIS OF THE PREVIOUS WORK PLAN PERIOD

The staff member prepares a self-evaluation based on the work plan. This report is as specific and accurate as possible, assessing the strengths and challenges of the results.

The self-evaluation then reflects upon what has been learned through work on each major objective. Ask:
- What was life-giving and what was life-draining in these objectives?
- What would I do differently?
- What creative ideas have I discovered?
- What new insights has come to me?

The final component of the self-evaluation is to identify the areas for which the staff member would appreciate consultation from the coaching team.

AGENDA FOR THE MEETING OF THE COACHING/EQUIPPING TEAM

1. **Community and Spiritual Formation:**
   a. Begin with a time of Dwelling in the Word and prayer
   b. Orientation to the C/E Process as needed
   c. Celebrate the gifts of the staff member given in faithful service

2. **Evaluation of the Previous Work Plan Cycle**
   a. The staff member shares is life-giving and life-draining in accomplishing their work.
   b. Review of the position description for accuracy and identification of any needed updates.

c. Review of the staff member's fulfillment of the position description, including the performance factors common to all staff members.

d. Express gratitude for work that has been accomplished and goals that have been met.

e. Identify challenges, frustrations, and parts of the work plan that have not been fulfilled, including whether to carry goals forward, or to develop a different approach.

3. **Establish The New Work Plan For The Coming Cycle**
   a. Receive feedback from the team, and adjust the goals/action plans as mutually negotiated.
   b. Decide how the team will track movement forward.
   c. Assign any remedial goals to focus job performance and accountability where goals have not been met or performance factors need to be improved in a structured and documented process.

4. **Plans for Continuing Education, Paid Time Off, and Compensation Review**
   a. Review of continuing education plans, if continuing education funds are part of the compensation package.
   b. Review of plan for paid time off
   c. Recommendations for any further actions in accordance with the Employee Handbook.

5. **Next Meeting and Documentation**
   a. Schedule the next meeting of the C/E team (at least two per year).
   b. Plan for documentation resulting from the C/E Team meeting. An annual written report will be submitted to the Personnel Committee and or session summarizing goal accomplishment and next steps.
   c. The meeting concludes with prayer and the sending of the staff member to their work.

WORKING THE PLAN IN COMMUNITY

1. **The Staff Member Engages Their Ministry**
   The staff member is responsible to fulfill the position description and follow the work plan. The staff member consults as needed on ways the plan progressing and obstacles to address.

2. **Work Plan Trackers (Recommended by the Presbytery of Donegal)**
   The staff member is responsible to maintain three Smartsheet Work Plan Trackers:
   a. **The Work Plan Tracker**
      The Key Objectives and Action Steps for the current Work Plan
   b. **Weekly Work Plan Tracker**

A weekly tracker listing major goals for the week ahead, what was accomplished in the previous week, and number of hours worked.

   c. **Coaching/Equipping Process Tracker**

This is the process tracker that documents when goals are submitted, when the team meets, and when reports are submitted to the Personnel Committee and or session.

Staff members are responsible to meet all deadlines in the C/E process as part of maintaining satisfactory job performance.

3. **Regular Check-Ins with Staff Members**

Identify when and how staff and other key leaders meet. Each meeting should allow time for community and spiritual formation. In addition there is time for the staff to be supported in their work, to seek feedback and to brainstorm new solutions.

The Head of Staff should base with each staff member on at least a bi-weekly basis. The captain of the C/E Team should touch base with the staff member on a monthly basis. One identified person should touch base with each pastor on at least a bi-weekly basis.

DOCUMENTS
- Sample Work Plan Smartsheet
- Sample Weekly Work Plan Tracker
- Sample Coaching/Equipping Process Tracker
- Executive Administrative Assistant Position Description (as a sample)
- Expectant Conversations: Preparing for a Good Future (Presbytery of Donegal Ministry Start-up Document)