Management Tools

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Employee Working File

Local supervisors should keep an informal working file for their direct reports. The working file prevents a manager/supervisor from relying on his or her memory. Anything related to an employee's employment can be tracked in a working file. These files must be kept confidential and secured (locked away if a physical copy or password protected if electronic) and should only contain objective, observable information. Items that might be included in a working file include:

- Documentation of things the employee has done very well – specific examples
- Copies of corrective actions or "Standards of Performance" documents that have been issued
- Time off requests
- Notes of one-on-one coaching times that are specific and refrain from assumptions
- Copies of annual performance evaluations
- Copy of the staff member's job description

Information kept in a working file should not include assumptions or subjective conclusions unless preceded by objective, observable examples.

See Documentation Best Practices for more tips and instructions.

Shared Documents (via Google, Microsoft 365, etc.)

With most documents stored digitally in software applications that allow for easy sharing, leaders and supervisors must be diligent about tracking who has access to confidential documents and files. Please use the following guidelines when handling employee documents:

- Ensure that document access is restricted to certain people.
- When sharing a document, make sure that the permission level is set correctly for those with whom you share it. This will safeguard against the document being shared with people who shouldn't have access to it.
  - Here's how you do that for Google Files: Stop, limit, or change sharing
  - Here's how you do that for Microsoft 365: Share your documents

Management/Coaching sessions

They are sometimes called one-on-ones, tune-ups, statuses, etc. Whatever they are called, they are vital to keeping lines of communication open between you and your staff member. It is the opportunity for expectations to be clarified, encouragement and constructive feedback to be given, and the relationship to continue to be built. There are many tools to help you facilitate coaching conversations. The sample tools below are "Plus/Delta" and "Start, Stop, Continue."

> **Plus/Delta**: A Plus/Delta is a method to do a "quick check" after a project, meeting, event, etc. One side of the "page" (or whiteboard for those of you that like those) are the "pluses" – what went well or things you would want to repeat. The right side is the "delta" – those things you'd like to change or do differently. This tool is helpful for brainstorming.
>
> **Start, Stop, Continue**: This can help with communication, supervision, or even meetings. What would you like me to start doing? What am I currently doing that you would like me to stop? What things work well, and that you'd like me to continue?

Stay Interviews

A stay interview is when a leader meets with a staff member to gather information about the things the staff member values about their job and to discover what they believe can be improved. In essence, a stay interview is similar to an exit interview, but it's done with active employees rather than those heading out the door.

Many things can be discovered during stay interviews. For example, stay interviews allow leaders to:

- Build trust between leaders and their team members.
- Engage with staff members to show their opinions are valued.
- Learn why staff members want to continue working for the ministry, and why they might want to leave.
- Find out if there are any issues that should be resolved between the staff member and any of their leaders or team members.
- Understand the staff member's stance on their current position and what they'd like to have changed.

- Determine what challenges staff members appreciate and what motivates them to work toward the ministry's mission.
- Gain a better understanding of the staff member's unique fears, dreads, hopes, and strengths.
- Gather actionable information about the current workplace climate.

For more details and sample tools, visit the Stay Interviews page.

SMART Goals

Writing good goals can help staff have clearly outlined expectations and give you a good measuring stick for how they have done with those goals. SMART goals are **S**pecific, **M**easurable, **A**ttainable (or Achievable), **R**esults-Oriented, and have a **T**imeframe. The measurable part of the goal can be either quantitative or qualitative. An example follows for both a quantitative and qualitative goal:

Poorly Written Quantitative Goal:

Focus on Ministry Team Development each week.

SMART Quantitative Goal:

Designate 4 hours per week towards MTD, including making at least 5 calls resulting in additional monthly support of $50 per month.

Specific – 4 hours per week, 5 calls, $50 per month

Measurable – it is clear whether the staff member has accomplished the goal or not

Attainable – is this goal reasonable?

Results-Oriented *(Quantitative)*– the goal is to continue to develop support. $50/month is a results-oriented goal.

Timeframe – each week

Poorly Written Qualitative Goal:

Lead/Facilitate a small group each week.

SMART Qualitative Goal:

Lead a small group every week with the goal of providing a "safe" environment where each person feels comfortable to contribute and where leaders are being developed. By the end of the semester, identify and begin meeting weekly with one individual (apprentice) who would like to grow into leading the small group. During this time with the apprentice focus on what is happening in her life, go through a book of the Bible together that you mutually choose, and co-lead 2 small group times with the apprentice by the end of the semester.

Specific – Weekly group meeting, one apprentice, meet weekly

Measurable –Whether the staff member has led the small group each week, people have participated, and/or whether an apprentice has been identified can be measured.

Attainable – is this goal reasonable?

Results-Oriented *(Qualitative)* – the goal is to have a small group where people are comfortable sharing and to develop an apprentice. By describing what success looks like, the staff member can see what "result" she is aiming for.

Timeframe – each week as well as by the end of the semester

Whether the goal is met or not, feedback is important. Some individuals feel it is difficult or unfair to make ministry about reaching goals or performance. It is important to understand that the goal is faithfulness. Someone once said that success is cooperating with what God is doing in your life at the moment. If a goal is not met, the next question becomes why. (For more on this, see Feedback, Recognition, and Career Development section.)

Knowing Styles: Yours and the person you are coaching

Understanding your own coaching style and adapting to meet the need is one aspect of being a good coach. Knowing your strengths and areas of opportunity for coaching will help you adjust your style to match what your staff member needs. Some staff members need more time for the relational aspect of coaching whereas others prefer more direct task supervision. Several models of leadership can help with this.

The DISC profile and MBTI Personality Assessment are also excellent tools for understanding styles and have applications for coaching, communication, team dynamics, and conflict resolution. Factors considered include how individuals best take in information (details or the "pieces" versus big picture), how individuals make decisions (objective criteria, logic, pros and cons versus beliefs and values and subjective considerations), whether individuals are more interested in coming to a decision quickly and efficiently or feel the process is more important, etc. These factors impact how others hear information and how they communicate information. Some conflict situations in a management scenario may come up from how ideas are presented, discussed, and decided to how an individual best "recharges" to handle the demands of ministry.

Often those differences in how we perceive information, make decisions, or order our world are the things that can cause conflict in relationships including the supervisory relationship. As we learn how our styles impact others and how to interact with other styles, we can increase our effectiveness in leading and communicating with those we manage and support.