



DRAFT Diocese of Nelson Performance Management Policy 2026

Date Approved: DD-MM-YYYY Date to take effect: DD-MM-YYYY
Approved By: Standing Committee
Review Date: MM 202X

1. Purpose

- 1.1 This policy establishes a reflective, strengths-based framework for performance management. It aims to:
- Support employees in fulfilling their roles effectively.
 - Foster spiritual, professional, and career development.
 - Provide a positive environment for feedback and dialogue.
 - Reinforce our Diocesan values: Family, Adventure, Innovation, Truth and Hospitality.
 - Identify and address unresolved issues impacting performance or wellbeing.

2. Scope

- 2.1 This policy applies to all employees (full-time, part-time, contractors, interns) of the Diocese of Nelson, its Parishes and any subsidiary bodies or mission units.
- 2.2 This policy does not apply to clergy, lay ministers, casual staff, or volunteers.

3. Principles

- 3.1 **Mission Alignment:** Performance conversations connect employee's own work to the Diocese's and Parishes mission and values.
- 3.2 **Reflective Practice:** Conversations are framed around Employees' own self-assessment and where they see opportunities for development of skills and experience.
- 3.3 **Strengths-Based Approach:** Discussions focus on leveraging individual strengths for growth rather than deficits in performance.
- 3.4 **Fairness and Equity:** All processes are non-discriminatory and transparent.
- 3.5 **Continuous Improvement:** Informal performance conversations are held on a regular basis, with ongoing opportunities to provide feedback, celebrate successes and identify training and development opportunities.

4. Roles and Responsibilities

- 4.1 **Managers:** Facilitate reflective discussions, provide ongoing, timely and constructive feedback, and support development.
- 4.2 **Employees:** Engage in self-reflection, raise concerns, look for opportunities to learn new skills, and commit to agreed goals.
- 4.3 **Diocesan Office:** Provide templates, training, and ensure compliance with employment standards.

5. Related documents

External guidance

- [Employment New Zealand website](#)
- [People Matter / He Taura Tangata](#) – Provincial Church Employment Guidelines



- [Title D Ministry standards](#) – Standards of Ministry for Bishops, Ministers and Office Bearers in the Anglican Church in Aotearoa, New Zealand and Polynesia.

Diocese of Nelson documents

- Code of Conduct
- Disciplinary Policy
- Anti-Harassment & Bullying Policy
- Equal Employment Opportunity Policy
- Health & Safety Policy
- Safeguarding Policy
- IT Acceptable Use Policy
- Whistleblowing/Speak Up Policy
- Grievance Policy
- Privacy & Data Protection Policy

Policy Statements

6. Annual review and development planning process

Timing

- 6.1 Annual reviews and development planning should be completed by the end of November each year.
- 6.2 New employees starting before 1 September should complete the planning parts of the self-reflection form before their 3-month anniversary.

Preparation

- 6.3 Manager and employee agree a time for a review and development planning meeting, ensuring sufficient time is given for preparation.
- 6.4 Employee completes a Self-Reflection Form (appendix 1) covering achievements, challenges, spiritual, personal and career aspirations and reviews job description.
- 6.5 Employee shares self-reflection form with manager prior to the review meeting
- 6.6 Manager reviews the self-reflection form, job description, prior goals, and prepares feedback.

Review and development planning meeting

Review

- 6.7 Participants should review work undertaken since the last meeting.
 - 6.7.1 Managers should look for opportunities to celebrate success and identify individual contributions to the wider team.
 - 6.7.2 Manager and Employee should discuss areas for improvement/development in a constructive manner.
 - 6.7.3 The Job Description should be reviewed taking into account any changes to the nature of the work being undertaken. Any changes should be agreed on by both parties.
 - 6.7.4 Any previously identified issues affecting performance or wellbeing should be reviewed. EAP should be offered if appropriate.

Development Planning

- 6.8 Participants then look forward to the focus areas for the next period.
 - 6.8.1 What new tasks/opportunities are foreseen?
 - 6.8.2 What training and development is needed?
 - 6.8.3 What are the overarching priorities for the year?



6.8.4 (if relevant) What discipleship and spiritual formation opportunities are available (e.g. retreats, mentoring)?

Goal setting

- 6.9 Participants agree on 3 or 4 main goals for the year ahead. These should be SMART¹ and can be:
- **Task related** e.g. *complete a review of parish communications before June;*
 - **Performance related** e.g. *Respond to all emails from parishioners within 2 days;*
 - **Behaviours related** e.g. *Contribute one piece of constructive comment at each staff meeting;*
 - **Learning/development related** e.g. *Complete an intermediate level Excel course by end of the year.*

Finalisation and ongoing review

- 6.10 After the meeting, the Manager should finalise the review and development form which should then be signed by both parties.
- 6.11 Informal check-ins throughout the year should be used to monitor progress against the key goals.
- 6.12 Ad hoc opportunities for training development should be assessed against training and development priorities for the year.

7. Managing performance

- 7.1 Managers should ensure that job descriptions reflect the work to be undertaken and that Employees are trained and equipped to do the agreed tasks.
- 7.2 Both Employees and Managers should give each other regular feedback on progress towards agreed tasks priorities.
- 7.3 Regular one-to-one catch ups to discuss individual progress are recommended. Whilst it can be appropriate to share individual successes within a team setting, it is never appropriate to share concerns about individual's performance in front of other team members.
- 7.4 Managers should refer to the Disciplinary Policy where there are ongoing concerns about an individual's performance.
- 7.5 Good performance should be acknowledged regularly and appropriately.

¹ **S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime-bound.



Annual Self-Reflection & Development Planning **template 20XX**

Employee Name:		Position:	
Parish:		Manager:	
Date of Review:		Date of last review:	

This template is designed to help you reflect on your achievements, identify growth opportunities, and plan development goals and work priorities in a positive, strengths-based way.

Please complete each section thoughtfully and then send it to your manager before your review meeting.

Section 1: Self-reflection

What achievements are you most proud of since your last review?	
What challenges have you faced, and how did you address them?	
Which strengths have you used most effectively in your role?	
What new skills or experience have you gained since your last review?	
How has your work helped contribute to our wider organisational and missional priorities?	
<i>Manager's comments</i>	



Section 2: Spiritual, Personal, and Career Aspirations

Reflect on your aspirations in these areas and how your role and workplace supports them.	
How have these changed or been met since your last review?	
What area would you like to focus on between now and the next review?	
<i>Manager's comments</i>	

Section 3: Job Description Review

Is your current job description accurate? If not, what changes would you suggest?	
<i>Manager's comments</i>	

Section 4: Work Priorities

What are the key areas that you want to focus on between now and the next review?	
<i>Manager's comments</i>	



Section 5: Development Goals (SMART)

Set 3-4 SMART goals for the next review period. Goals can be task-related, performance related, behavioural, training/learning related or related to Spiritual development.

Goal	Specific Actions	Support needed	Target Date
1.			
2.			
3.			
4.			
<i>Manager's comments</i>			

Remember: Goals should be Specific, Measurable, Achievable, Relevant, and Time-bound.

Section 6: Final Comments

Are there any other issues you would like to raise at your review meeting?	
<i>Manager's comments</i>	

Acknowledgement

I acknowledge that this captures the discussion at the performance review and development planning meeting.

Employee Signature: _____

Date: _____

Manager Signature: _____

Date: _____