Evaluating Ministry in Congregations
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ASSUMPTIONS

All ministries of the church are SHARED ministries and must be evaluated as such
- Ministry is widely understood to be the work of religious professionals
- Congregations pay staff to do their ministry for them
- Church staff are held uniquely responsible for congregation's overall success
- Church staff are highly scrutinized but their jobs are poorly understood
- Consider array of contributing factors to effectiveness of every aspect of congregational life

Evaluations as proxy for many other issues
- power and authority: implicit vs. explicit – evaluations are often where the implicit tries to outrun the explicit
- accountability: healthy mutual conversation about contributions to ministries vs. bash you over the head vs. anonymous feedback ducking own accountability
- unhealthful people/systems will seek and find opportunities to act out

The perfect evaluation process will not fix confusion or conflict about roles and authority
- there is no technical solution (ie evaluation format) that can solve an adaptive systems challenge (ie lack of operational clarity about who supervises whom)
- until different assumptions about authority and power are surfaced and clarified no evaluation method will work

Congregational polity presents unique challenges
People confused about what congregational polity really means: emphasize autonomy over interdependence. Implications for evaluation:
- focus on individual staff person's ability to keep individuals happy & satisfied
- evaluations perceived as the vehicle through which individuals' happiness and satisfaction is measured
- example: anonymous surveys

People confused about "democracy": most congregations have hybrid consensus-democracy where loudest voices clog process; difficulties with representative democracy. Implications for evaluation:
- assumption that evaluation will focus on individual performance and individual opinion of that performance
- isolation rather than interdependence

- example of implications for evaluation: musician evaluated only against fidelity to job description/technical proficiency; satisfaction of choir

Freedom of the pulpit
- some clergy believe freedom of pulpit means they can say and do anything they want free from congregational "interference"
- challenging for congregants to know how to provide appropriate feedback
- freedom of pulpit is real: congregation called minister specifically to use his/her judgment in service of mission
- implications for evaluation: ministries can be under-evaluated, anonymous surveys can be unusually harsh

Fundamentally, all of the congregation's ministries – including those of professional staff – should be evaluated based on their contributions to the congregation's purpose/mission
- consider your own jobs: what would it be like if your boss didn't know what the purpose of your company was? what would it be like if your boss was left to her own devices to decide what the purpose was and what you were supposed to do to contribute, but she never consulted the clients/customers?
- not charisma, not fabulousness, not charming good looks: PURPOSE
- challenge: most congregations aren't that clear about mission
- not specific enough to help leadership discern course, much less specific enough to evaluate staff performance

Evaluation is only one part of a congregation's responsibility as an employer; all must be effective for any to be effective
- Fair compensation practices
- Hire/fire processes and authority
- Clear job descriptions
- Clear program goals for area of ministry
- Supervision
  o Professional goals for employee
  o Integration with other ministries of church
  o Performance review/evaluation
  o Professional development

Ministers and church staff deserve to know what is expected of them, what resources are available to them, and how their performance will be judged and appreciated
- Accurate, tenable job descriptions that are reviewed regularly
- Sufficient resources (program budget, volunteer time, support) to meet job requirements
- No major gaps between responsibility and authority
- Clear supervision and support

- … the right NOT to be supervised by a committee

- the right NOT to have one "supervisor" set program goals for area of ministry while another evaluates their performance
- the right NOT to be evaluated by anonymous surveys

DISCUSSION

Understand what your congregation's authority and accountability structures are on paper, and what they actually are.

➢ What assumptions about authority, responsibility and accountability seem to be embedded in your congregation's evaluation process?
➢ Are these assumptions "true"?

Develop clarity around understanding shared ministry.

➢ How aware are your people that ministries of the congregation are partnerships among lay leaders, lay folks, and professional staff?
➢ What is your leadership role in building awareness of shared ministry as essential to congregational purpose?

Describe your congregation's formal evaluation process.

Clarity about who is responsible for stewarding conversations around evaluation, and which leaders play which roles in those conversations.

How well is your evaluation process connected to congregational mission/purpose?

➢ How might your staff/shared ministry evaluation process help staff and congregation contribute to congregational purpose?

Figure out extent to which you have an adaptive challenge around evaluation or a technical one, or both.

This is the primary task of leadership: discernment about what kind of challenge/issue the community is facing. Consider which issues are "technical" (ie,, where issue is clear and leadership task is to gather information and choose from among various possible solutions) and which are "adaptive" (ie new learning and new ways of seeing things will be required to even understand what the core issues are).

➢ What aspects of this congregation's evaluation process require technical adjustment?
➢ What aspects seem to be adaptive challenges?
➢ What do you need to learn more about to address those adaptive challenges?

NEXT STEPS
Review employment practices, determine who in church system is responsible for what:
- Fair compensation practices
- Hire/fire processes and authority
- Clear job descriptions
- Clear program goals for area of ministry
- Supervision
  - Professional goals for employee
  - Integration with other ministries of church
  - Performance review/evaluation
  - Professional development

Review each position (minister and staff) for adherence to:
- Accurate, tenable job descriptions
- Sufficient resources (program budget, volunteer time, support) to meet job requirements
- No major gaps between responsibility and authority
- Clear supervision and support
- … the right NOT to be supervised by a committee

Board discerns which issues are "technical" and which "adaptive" around employment and evaluation processes

TECHNICAL CHALLENGES
- new job descriptions needs to be developed
- committee responsibilities need to be tweaked
- budget $$ need to be shifted to better match responsibility with resources
- decide which evaluation model to use

Primary leadership role for technical challenges: delegate information gathering, decide, oversee policy approval and delegate procedures

ADAPTIVE CHALLENGES
- clear sense of congregational purpose
- awareness of shared ministry
- surface implicit and explicit lines of communication, authority and accountability

Primary leadership role for adaptive challenges: create holding environment in which congregational can learn what it needs to learn to understand what the "real" issues are and how to work together to address them; keep sense of urgency high; be a non-anxious leadership presence

RESOURCES FOR CONGREGATIONAL EVALUATION

Please note: it is unlikely that any congregation would want to pick up any of these evaluation resources and simply adopt them whole. Resources are listed here primarily to spark ideas. It is up to congregational leadership to adapt these ideas to your specific context. Each can be adapted to focus on ordained ministry, music and religious education ministries.

Assessing our Leadership: Promoting Effectiveness in Congregational Leadership
http://www.uua.org/documents/mpl/assessing_leadership.pdf
Resource created by the UU Minister's Association (UUMA), the Liberal Religious Educators Association (LREDA), and the UUA's Department of Ministry & Professional Leadership. An excellent detailed overview of many of the issues and assumptions described in this presentation.

Annual Church Review Procedure
http://alban.org/bookdetails.aspx?id=3522&terms=annual+church+review+procedure
Developed and tested in a Unitarian Universalist church, this instrument can be used easily by any congregation to assess and evaluate the effectiveness of its overall ministry—whether carried out by members, committees, or the pastor. Includes questionnaires for various committees and ministry efforts. Excellent for use in annual assessment, planning, and budgeting meetings. Report format.

Sample Evaluation Forms for Ministers
Understanding our Ministry Together: An Evaluation Process for Congregations
http://www.uuma.org/resource/collection/9D85448E-AE71-4EB1-B5B0-
8C537C052ADF/Assessment_UnderstandingOurMinistry.pdf
The process employs small focus groups and an adaptable set of questions to assess holistically the effectiveness of the ministry of the congregation, lay leaders and minister(s). It fosters an understanding that the minister and the congregation function as a ministry team. Positive strengths as well as areas of growth for both congregation and minister are explored. (Developed by the Rev. Dr. Anita Farber-Robertson.)

Ministerial Fellowship Committee Model
http://www.uua.org/leaders/leadership/ministerialfellowship/15505.shtml
This model, developed by the MFC for ministers in preliminary fellowship, focuses on evaluating both the minister's and congregation's contributions to each area of congregational life.

Books
When Better Isn't Enough: Evaluation Tools for the 21St-Century Church by Jill M. Hudson (Alban Institute)
Approaching the postmodern era as a tremendous opportunity, Hudson identifies 12 characteristics by which we can measure effective ministry for the early 21st century. Based on those 12 criteria, Hudson has created evaluation tools to help congregations improve their ministry, help members and staff grow in effectiveness, deepen a sense of partnership, and add new richness to the dialogue about a congregation's future.

Evaluating Ministry: Principles and Processes for Clergy and Congregations
by Jill Hudson (Alban Institute)
For an overview of evaluation models arising from Ms. Hudson's book, see
http://www.uuma.org/files/Assessment_ReflectingOnMinistry.pdf

When Moses Meets Aaron: Staffing and Supervision in Large Congregations
by Gil Rendle & Susan Beaumont (Alban Institue)
Beaumont and Rendle have taken the best of corporate human resource tools and immersed them in a congregational context, providing a comprehensive manual for supervising, motivating, and coordinating staff teams. Rendle and Beaumont give both detailed and big picture guidance on hiring, job descriptions, supervision, performance evaluation, staff-team design, difficult staff behavior, and more.