

MINISTRY MATTERS:

A Guide to Conducting a Mutual Ministry Review



EPISCOPAL DIOCESE OF TEXAS

2009



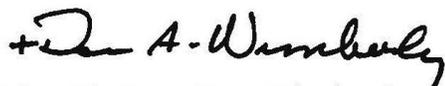
PREFACE

We believe that the vision and work of a congregation is not the job of the clergy alone but is the shared joy and responsibility of the whole congregation. Although the leader is important, ministry is carried out by many in addition to the leader. Our varied gifts and limitations mean that only together, with the help of God's transformative spirit, can we grow to reflect the light of Christ that is within us each and all.

The goal of the Episcopal Diocese of Texas is to provide a process and set of tools to enable congregations to review and strengthen their ministries. Because ministry matters, a team of clergy and lay people representing the Diocese has created a process and tools for a mutual ministry review. The Mutual Ministry Review process and tools are designed for broad application for churches and missions of all sizes across the Diocese.

If you are interested in understanding how the ministries of your church are experienced, if you want to strengthen your own or your church's ministry, or if you want to look at today's ministries with an eye toward tomorrow, then a Mutual Ministry Review will be beneficial to you and your congregation. The Mutual Ministry Review is designed for parishes and missions to use for their own interests and growth rather than for diocesan reporting.

Our hope is that congregations will use the MMR to strengthen the ministry of individuals, groups, and the congregation as a whole as they grow in the image of Christ.


The Rt. Rev. Don Wimberly


The Rt. Rev. C. Andrew Doyle

We, the Mutual Ministry Review Design Team, believe “Ministry Matters!” Therefore, we offer this Mutual Ministry Review Guide with the hope of strengthening the people and work of those engaged in Christ’s ministry in the Episcopal Diocese of Texas. The mission of the Mutual Ministry Review Design Team was to create and develop a plan which would enable vestries, lay leaders, and clergy to assess how they live out their baptismal covenant through their joint and varied ministries.

We developed this material after researching what other dioceses were doing in the area of mutual ministry review and with input from many in the Episcopal Diocese of Texas through a survey. To that background, we added our own knowledge of congregational life, organization assessment, and human resources, and we generated new ideas through many hours of discussion and design. We believe we have created a process and tools that can be used effectively in churches of all types and size. Although the Guide is substantial in content, the process is easy to carry out, and the tools simplify getting and using information from the congregation.

Our hope is that the Mutual Ministry Review will stimulate opportunities for reflection, conversation, dreaming, and planning for the spirit-filled ministry in which we all are engaged. Thus, the Mutual Ministry Review Design Team offers this MMR Guide to the people of the Episcopal Diocese of Texas with humility, grace, and thanksgiving. Our belief is that Mutual Ministry Review will strengthen ministry throughout the church. Our prayer is that, with the support of the Holy Spirit, the Mutual Ministry Review will be received and used for the building up of the Kingdom.

The Mutual Ministry Review Design Team

Betsy Oglin
Mary M. MacFegor
Janet Huntress +
Deborah A. Otten
Linda W. Astala

Sam Smith
Janet Manning
Evelyn Hecaday +
Michael Parker Schaefer
Russ Oehlert, Jr.

MINISTRY MATTERS REVIEW GUIDE

I. INTRODUCTION

- A. Theological and Biblical perspective on Mutual Ministry Review
- B. Working definition of “ministry”
- C. Questions and answers about the Mutual Ministry Review

II. OVERVIEW OF AN MMR

- A. What is a Mutual Ministry Review?
- B. Assumptions and underlying principles
- C. Is/Is Not
- D. Benefits and outcomes of conducting a Mutual Ministry Review

III. DESCRIPTION OF THE PROCESS

- A. Overview
- B. Who is involved
- C. Core process
- D. Going broader and deeper
- E. Frequency and timing of an MMR

IV. MMR FACILITATORS

- A. Role of the facilitator
- B. Criteria for selection
- C. How to identify and select a facilitator
- D. Facilitators versus consultants
- E. Evaluation of the facilitator
- F. Payment of the facilitator
- G. Evaluation forms

V. APPENDIX

- A. Contact Information
- B. References and Web links
- C. Annotated Bibliography
- D. Definition of ministry roles
- E. “One Size Does Not Fit All”
- F. Twelve Marks of a Healthy Church
 - a. Description
 - b. Survey

VI. TOOLS (Separate Document)

- A.** Step 1: Planning tools
- B.** Step 2: Background tools
- C.** Step 3: Getting input tools
 - i. Reflection worksheets
 - ii. Surveys
 - iii. Focus group and interview guides
 - iv. Input summary
- D.** Step 4-6: Meeting agendas and tools
- E.** Step 7: Communication tools
- F.** Alternative format and other tools
 - i. Retreat
 - ii. Closing out a ministry

I. INTRODUCTION

Following Jesus does not mean slavishly copying His life.

It means making His choice of life your own

starting from your own potential

and in the place where you find yourself.

It means living for the values for which Jesus lived and died.

Rule for a New Brother, Templegate Publishers, 1973¹

A. Theological and Biblical Perspective on Ministry Matters Review or Mutual Ministry Review?

You may be wondering why the Church would develop a process like this and what the rationale is, other than to be like businesses and social service organizations. What is it in our theological and Biblical heritage that would drive us to do something like an MMR?

As baptized Christians, each of us is called to ministry. Through the commitment to our Baptismal Covenant, we are invited and empowered to join God in doing what God does best: transforming the lives and hearts of all who serve Him and bringing reconciliation and peace to a broken world. We are called to serve the needs of “the least of these” and to teach the Good News as we go out into the world to love and serve Him. We serve God as covenant-bearers.

Our Catechism² teaches about the work we as Christians are engaged in, with this question and answer:

Q. Through whom does the Church carry out its mission?

A. The Church carries out its mission through the ministry of all its members.

New Testament scripture tells us about the shape and form of ministry. In John’s gospel we are told: “A new commandment I give you: love one another. As I have loved you, so you must love one another. By this all men will know that you are my disciples, if you love one another.” (John 13:33-35) Thus, we believe we are called together, in mutuality, to love one another. In the writings of Paul, we are asked to reflect on our varied and various gifts and to use those gifts to build each other up. Paul says to the Romans, “You and I may be mutually encouraged by each other’s faith.” (Romans 11:12) We find in the Epistle to the Ephesians this guidance: “Be kind and compassionate to one another, forgiving each other, just as in Christ, God forgave you.” (Ephesians 4:32) Throughout scripture, we hear about our call to

ministry. Living out that call is the challenge and gift given to each of us and to our Christian community, and it is the focus of the MMR.

The whole process of the MMR is based on two inseparable tenets of faith. First, as Christians, we know that we are created “in the image of God...” and are enlivened with the breath of God. That means each person is unique and valuable and bears the mark of God. (Gen. 1:27) By Paul, we are reminded over and over again of our unique gifts and of how the Church needs and values them all. He says in I Corinthians, “There are different kinds of working, but the same God who produces all of them in everyone. Now to each one the manifestation of the Spirit is given for the common good. To one there is given through the Spirit the message of wisdom, to another the message of knowledge by means of the same Spirit....” (1 Corinthians 12:6-8)

And second, that, in spite of our best intentions, we will fall short and we stand in need of the grace and forgiveness of God and others. Paul tells us about the “thorn” in his own side, and reminds us that we must enter into our life and work as Christians in a spirit of humility and forgiveness, because at some time and in some way, we will not meet our own or others’ expectations. In this process, as in all of life, we need others to help us see what we cannot see as they strengthen and encourage us. Ephesians 5: 32 tells us, “Submit to one another out of reverence for Christ.” The basis of our MMR model can be found in the early church’s teachings in Thessalonians: “Therefore encourage one another and build each other up, just as in fact you are doing. Now we ask you, brothers, to respect those who work hard among you, who are over you in the Lord and who admonish you.” (1 Thessalonians 5:11-12)

Thus, for Christians, ministry is a response to our baptismal covenant, grounded in the model of Christ, and because we know we are both the image of God and imperfect, we enter into a process that will help us see our ministry as it is, while seeking to make it become as Christ would have it.

B. Working Definition of Ministry

For the MMR to be effective, we need to be clear about what we mean by ministry. Ministry is often defined as service to God, to the congregation, or to the larger community in the name of Christ. The word “ministry” comes from the Greek, *diakoneo*, which means “to serve” and also *douleuo* which means “to serve as a slave.” Ministry has also been defined as, “joining with God in doing what God does.”³ This definition is rich and grounds our Christian thinking about ministry in God, and brings us back to the call of our baptismal covenant⁴:

- To continue “in the apostles’ teaching and fellowship, in the breaking of bread, and in the prayers,”
- To persevere “in resisting evil, and whenever we fall into sin, repent and return to the Lord,”
- To proclaim “by word and example the Good News of God in Christ,”
- To seek and serve “Christ in all persons, loving our neighbors as ourselves, “ and
- To “strive for justice and peace among all people, respecting the dignity of every human being.”

For the purposes of MMR ministry, grounded in our baptismal covenant, ‘joining with God’ is defined as:

the work of individuals and groups carried out in the name of Christ and in the tradition of the apostles, enlivened by the Spirit in response to God’s call to live out our faith in service to others. Ministry includes caring for the spiritual, emotional, mental, physical, vocational, and financial needs of others.

A dual view of ministry can be found in scripture--all believers were to exercise a ministry in accordance with their spiritual gifts but authoritative teaching, leadership, and discipline were limited to a recognized body of elders⁵.

Thus, whether you are a member of the clergy or laity, serving those within your congregation or outside of it by distributing flowers, praying, providing a listening ear, or sweeping floors, you are engaged in ministry as long as your work is done with the intention of bringing Christ’s healing and enlivening presence. We are called to our ministry by our baptism. We may enter into ministry as a conscious decision to serve in a particular way or simply by intentionally reflecting the love of Christ in our everyday engagements.

C. Questions and Answers

Following is a series of questions many have asked about the Mutual Ministry Review and answers that describe what the intention of the Review is.

Q. What is A Mutual Ministry Review?

A. A Mutual Ministry Review is a facilitated process that enables a congregation to reflect on and strengthen its work of ministry to enliven the church so that each person’s unique gifts work together for the growth and spread of God’s Kingdom and the service of God’s people.

Q. Why should we do this?

A. A Mutual Ministry Review provides a way to honor our call to serve God and God's people through engaging one another in meaningful conversation about ministry. This process will enable those involved to understand both the impact of current ministry, as well as discuss desires for future ministry. The process is aimed at building on what is valuable in our ministry in order to meet the hopes and needs of the future.

Q. How is this different from a visioning or long-range planning effort?

A. The focus of this effort is on the present as well as the future, and the review may include a review of specific areas of ministry within a congregation's life together, where visioning or long-range planning efforts are entirely future focused. A Mutual Ministry Review, however, can build upon any vision or long-range planning that has been done. By focusing on the work of current ministry carried out by church leaders and members of the congregation, a group conducting a Mutual Ministry Review can see how specific ministries support the vision and long-range plan of the church, and how well they are serving the congregation and those in the community.

Q. What will this do for our congregation and for me?

The Mutual Ministry Review can help leaders in the congregation understand the current impact of the ministry of the congregation and how that ministry needs to be shaped to meet the needs of the future. It can also help individuals discern the value of their contribution to ministry and gain support for further development. The MMR will enable the group conducting the review to create a tangible plan to continue and strengthen what is valued in the work of ministry.

Q. How does a Ministry Matters Review work?

A. The Mutual Ministry Review Guide provides a simple, step-by-step process that involves some initial information gathering followed by a series of three (3) meetings built around key questions to assess, appreciate, and build on the work of ministry being done in a given church or mission. There is flexibility to make the process very simple or more complex, depending on the congregation's size and interest.

Q. Who is involved in the Review?

A. The initial decision and planning for the review is done by the rector and senior warden and possibly a few other congregational leaders. Then a team of leaders from the congregation, which may include members of staff and select vestry members, will carry out the review. However, many, if not all, of the congregation can be involved by giving input on the current work of ministry and identifying needs and interests for the future.

Q. How long does the Mutual Ministry Review take?

A. The Review may be conducted in as short a period of time as a day and a half (after initial information gathering) or in a series of meetings over several weeks. Part of the time horizon depends on the breadth of the goals of the review and the level of information gathering done prior to the meetings. For the sake of continuity it is recommended that the process be completed in no more than a three month period of time.

Q. How frequently should a congregation do a Mutual Ministry Review?

A. A simple, core review may be conducted as frequently as every year. A congregation may want to conduct a baseline-MMR the first year and then tackle certain areas of ministry in the following years. A more in-depth review would probably be conducted every four to seven years to look more deeply into the overall effect of the ministries of the church.

Q. What is the difference between a Mutual Ministry Review and a performance review?

A. The Mutual Ministry Review is focused on the impact of ministry (or select ministries) on the congregation and/or the larger community. A performance review (also offered by the Diocese) is focused on an individual's performance of job duties for a set period of time. While an individual may get feedback as ministries are discussed, that is not the primary focus of the Mutual Ministry Review.

Q. Are there trained persons who can come in and help a congregation with the process?

A. Yes. The Diocese of Texas has identified and trained a set of facilitators who are familiar with the process and experienced in leading groups through a process to achieve desired results. The list of facilitators may be obtained from the Diocesan Office of Leadership Development. If a congregation desires to use a different facilitator, we recommend she/he meet the criteria laid out for facilitators and that the selected facilitator meet with Mutual Ministry Review leaders for an orientation to this particular process.

Q. Is there a cost to conducting a Mutual Ministry Review?

A. The Mutual Ministry Review should be conducted with the assistance of a trained facilitator. The primary outlay of money is for the consultant or trained person's service. The Diocese may provide partial financial support based on need and mutual agreement between the congregation and Director of Leadership Development to do so. Additional costs may include incidental items such as refreshments, retreat facility (if that format is selected), and copying. The main resource required is

II. OVERVIEW OF A MUTUAL MINISTRY REVIEW

I do not believe we could ever attain perfect love for our neighbor unless it had its roots in the love of God. Since this is so important, sisters, let us strive to get to know ourselves better and better, even in the very smallest matters...

Teresa of Avila, Interior Castle⁶

A. What is a Mutual Ministry Review

A **Mutual Ministry Review** is a structured approach and process that enables congregational leaders and groups to reflect on, talk about, and celebrate their ministries. The MMR process is positive and trust-inducing in its aim to strengthen ministries so that each person can use his/her unique gifts for the growth and spread of God's kingdom and in service of God's people. The Mutual Ministry Review is designed to encourage and develop ministries and to strengthen the people and relationships of those involved. The Mutual Ministry Review provides a process through which church leaders and groups may ask themselves, "How are we living out our call to serve God and God's people?" and then engage in meaningful conversations about their answers.

As the Diocese of Texas has conceived it, a Mutual Ministry Review highlights and affirms the gifts, strengths, and values of the ministries of groups, individuals, and congregations as a whole. Through the process of a Mutual Ministry Review, congregational leaders will identify and celebrate what is working well in the ministries of a congregation as well as the hopes and needs for future ministries. The MMR provides an opportunity for the faith community to assess the success of the past and understand what has had a positive impact.

In addition, the Mutual Ministry Review will identify any current gaps along with future needs that a congregation and its leaders want to address to strengthen or modify certain aspects of ministry. Gaps may be occurring because of intentional or unintentional shifts in resources—people, time, finances, energy, leadership in transition, attention/focus, or for a variety of other reasons. As a church reflects on its current ministries, it may also identify needs that it would like to be able to meet in the future.

Through this process, the identified gaps and needs are coupled with the strengths and valued gifts as the building blocks to envision a hope-filled future. Thus, the reflection on ministry serves as a basis for future action.

Because the work of ministry is not done by one person operating in a vacuum, the Mutual Ministry Review is collaborative in nature, as it involves clergy, vestry, lay leaders,

church staff, and others. In a sense, the Mutual Ministry Review is a facilitated conversation about what is working or not working, and how to build toward excellence going forward. A Mutual Ministry Review is people talking together about what they value of the work they are doing and what they dream of doing in the future.

Because Christian ministry is understood as the “work of God” through the Holy Spirit, it can never completely fit into a box or be black and white. In the Mutual Ministry Review process, as in the life of the Church, there must be room for mystery and the unexpected challenges that happen as we live out our faith. The Mutual Ministry Review, therefore, is designed to be used with many variations of application. The Mutual Ministry Review process also includes quiet, prayer, and reflection to make a space for what God reveals.

A Mutual Ministry Review seeks to answer these questions:

- How does the work of ministry of this congregation align with its overall values, mission, vision, and goals?
- What has happened as a result of our congregation’s ministries?
- What gifts, strengths, challenges, and opportunities are seen in our ministries?
- Where has God/Christ/the Holy Spirit been experienced through our ministries?
- How well do the leaders work together to faithfully serve the congregation and community?
- What are the gifts, hopes, calls, and needs for the future ministries of this congregation? What will we do to address those?
- How can the leaders and groups be supported in their growth, spiritual development and learning?
- What are our priorities for ministry in the coming year?

B. Assumptions and Underlying Principles of Mutual Ministry Review

The design of the Mutual Ministry Review process and tools is based on these tenets:

- Ministry is our response to God’s call to us to model Christ in the world; it is both particular and general.
- Our work of ministry is embedded in God’s love for us, all people, and all of creation.
- The Christian journey is one of continued growth and transformation, both as individuals and as the body of Christ so that God’s light, love, and healing pour through us to others.
- Ministry is the work of clergy and laity, of congregational leaders, groups in the congregation, and of the congregation as a whole.

- The work of ministry balances focused effort toward achieving visions and goals, the spontaneous response to immediate needs, and the call to serve in new ways.
- Ministry occurs in a context and is responsive to that context.
- Ministry is built on the gifts and energy of groups and individuals in response to a vision or felt need and is Spirit-led and Spirit-fed.
- We bring our whole self to the work of ministry—strengths, challenges, gifts, and hopes.
- Those engaged in ministry desire to understand the impact of their work.
- Leaders in ministry have a significant influence on the nature and impact of ministry and, therefore, bear a key responsibility for ministry.
- Churches and people are strengthened by self-knowledge. For Christians, self-knowledge is a path to transformation.
- Ministry provides opportunities for growth and benefits to the person providing the ministry, as well as to those receiving service.

C. Is/Is Not

Mutual Ministry Review (MMR) does not mean the same thing in all places where the practice is carried out. Other dioceses and other denominations have different intentions and practices. We, in the Diocese of Texas, would like to be clear about the Mutual Ministry Review, what it is and is not:

IS/WILL BE	IS NOT/WILL NOT BE
Based on the understanding that ministry is grounded in God	Just another corporate evaluation process
A review of the overall results of ministry to understand its effectiveness and impact	An organization review of the overall church's functioning nor a detailed program review of a single program
An aid to discussion on what is valued in ministry/specific ministries	Primarily a diagnostic tool
Designed to build trust and strengthen relationships	Used by a faction of the church against individuals or other groups
A collaborative, shared experience of reflecting on ministry understood as a mutual engagement	A focus on one or even a few people nor limited to feedback to and from one or a few people
Focus on building strengths, supporting gifts, and celebrating results of ministry	Negative or critical in intent; a place to express pet peeves or to push personal agendas

MMR IS / WILL	MMR IS NOT / WILL NOT
May include reflection on the accomplishment of the church's vision, values, and goals for ministry for a pre-determined period of time	A visioning or goal setting process per se*, but may include items that fit into a visioning/goal setting process in the final action planning
Reflect on the congregation's leadership, in the light of the effectiveness of the ministries and mission of the church	Not a personality assessment or performance review against specific job responsibilities*
A set of tools for selected and tailored use by congregations and leaders	Pre-determined, one-size fits all process and tools
Provide a format for individuals, teams, and groups to assess and discuss their working relationships	A conflict mediation process. An MMR is not recommended if there is known substantial conflict among the leadership.
Provide information useful for development of individuals and groups	A tool for the Bishop to find out what's happening in a particular congregation
Designed to be repeated by churches with modifications to fit each application	Not the same process year after year. Not to be done once and never again
Produce an internal report for use by the congregation and its leaders	A report to the Diocese on details of ministry, but will include notice to the Diocese that an MMR was done
Identify gaps, needs, and opportunities for growth and development and ways to support or address these	Fault-finding or blaming in intention, process, tools, or tone
Allow for setting future intentions and goals of ministry	A full-blown visioning or goal setting process*
Provide tools for prioritizing, planning, and tracking future ministry changes and actions	Totally open-ended process with no conclusions

*** Other Diocesan tools and processes are available for these purposes through the Office of Leadership Development.**

D. Benefits And Outcomes of Conducting a Mutual Ministry Review

Benefits

We believe this Mutual Ministry Review process is beneficial both to individual congregations and their leaders, as well as to the Diocese in the following ways:

- provides insight into the impact of the ministry of individuals and groups, and to the church as a whole;
- is non-threatening in approach, looking at what is valued and desirable in the work of ministry in order that it might be repeated and built upon;
- has a flexible design to fit various sizes and types of congregations, allowing a church to start small and build or to review every aspect of ministry;
- supports objective assessment of how things are going, so that efforts may be focused on those opportunities that best fulfill the goals of ministry for the congregation; and
- provides a tool for congregations to identify future hopes and needs, priorities, and action plans to build the desired future.

Expected Outcomes

While the outcome of an MMR depends to some degree on the intentions of an individual congregation, it is expected that an MMR will provide the following:

- ✓ A picture of how the values, mission, vision, and goals for ministry are being lived out
- ✓ A clearer understand of how people experience the ministry/ies under review
- ✓ Open conversation about what is valued in current and future ministry
- ✓ Greater clarity about individual leaders' and groups' gifts and areas for development for ministry
- ✓ Future interests and needs for ministry
- ✓ Mutual understanding of shared goals and intentions of current and future ministries
- ✓ Specific goals and actions to strengthen ministry
- ✓ Agreement on a basis for action --things to keep, do more of, do less of
- ✓ Tangible descriptive information about the mutual ministries of a congregation that may be communicated internally or externally
- ✓ Agreed-upon priorities to give focus to ministry in the next year

In summary, the Mutual Ministry Review provides an opportunity for all involved in ministry, both lay and ordained, to identify and celebrate areas of success and to clarify opportunities for development. The Mutual Ministry Review provides a structure for leaders to work together to identify hopes and priorities for the future work of ministry, including identification of new ministries and ministries that need to be closed out. The intention is that, through this effort, the overall mission of the church and the congregation will be better understood and more fully lived out. The Mutual Ministry Review will better enable those involved to see how ministry in the present can be built upon to meet the needs and hopes of the future in response to the urgings of God, in the model of Christ, and through the power of the Spirit.

III. DESCRIPTION OF THE PROCESS

The gifts Christ gave were that some would be apostles, some prophets, some evangelists, some pastors and teachers, to equip the saints for the work of ministry, for the building up of the body of Christ, until all of us come to the unity of faith and of the knowledge of the Son of God, to maturity, to the measure of the full stature of Christ.

Ephesians 4:11-13

A. Overview and Approach

The overall approach of the Mutual Ministry Review involves a seven-step process that guides a leadership team through gathering information on the church and its ministry, reviewing what is currently occurring in the ministry of a church or mission, identifying strengths and challenges, and establishing a plan for ministries in the future. The Mutual Ministry Review is appreciative in nature, searching for strengths, gifts, and hopes rather than simply, critically trying to find areas needing improvement. The Review will highlight achievements and will also identify opportunities for strengthening and better supporting the work of the congregation. The Mutual Ministry Review looks at what is happening in the present and asks questions about the future.

The Mutual Ministry Review is designed to be used by congregations of varied size, length of existence, demographics, and patterns of growth. (See Appendix for briefing on ministry style and size of church⁷). The process, therefore, is designed to be tailored to a specific congregation's intentions, interests, needs, and resources. The Mutual Ministry Review may look at the overall work of ministry in a church or focus on specific areas of ministries.

To accommodate varying needs and interests, the Mutual Ministry Review designers have defined a "core process and tools" that can be used by anyone. In addition, the Mutual Ministry Review provides an array of options and tools for those who want to go broader or deeper. The Diocese of Texas recommends using a facilitator who can tailor both process and tools.

The Mutual Ministry Review process is laid out in detail in this section of the Guide. The tools for each step are provided in the following section. Although there is a lot of material here, the process need not be complicated and can be carried out in three

short meetings (a minimum of two hours each) with a little front- and back-end work. Those who want to do a more in-depth look will find the tools needed to do that as well.

Go/No-Go Decision

In the first step of the process, the rector/vicar and senior warden (at a minimum) decide whether to conduct a Mutual Ministry Review, when and how it should be conducted, what the focus should be, and who should be involved. This smaller group may get input from vestry, staff, and others before making the “go/no-go” decision. A Mutual Ministry Review should not be conducted without the full support of the rector/vicar and senior warden nor should it be conducted if there is serious conflict in the church. While differing views are natural in any community, significant conflict should be handled through another process. If a rector/vicar has been in the position for less than a year, it is advisable to wait to conduct a Mutual Ministry Review until that person can become fully acquainted with and integrated into the ministry of the congregation.

The period of time under review should also be determined. The MMR designers recommend a one-year look-back period, although a two-year period would be acceptable. Because of changes that occur in a longer time period, and the amount of information required, a longer period of review is not advised.

B. The Mutual Ministry Review Process

Following is a detailed description of the seven-step Mutual Ministry Review process with a graphic presentation of those steps and their focus. Tools, documents, and templates accompany each step of the process. The meeting part of the process (steps 4 through 6) may be carried out in a series of meetings at the church or in a retreat format with time for prayer and scripture study. Materials are provided for both formats in the tools section.

STEP 1: DESIGN THE MUTUAL MINISTRY REVIEW

- What areas of ministry will we review?
- Who will be involved?
- How will we conduct the Mutual Ministry Review?
- Who will facilitate?
- How will the decision and plan be communicated?

What to Review

One of the decisions to be made in the first step of the Mutual Ministry Review process is what will be reviewed. The Mutual Ministry Review may take a broad-brush look at the overall impact of ministry on the congregation or look at specific areas of ministry,

such as Christian Education or Outreach. Although the focus of the review is ministry, ministries are led and carried out by individuals. The review will necessarily provide feedback to the leaders of these ministries on the effect of their work. The Mutual Ministry Review may give church staff the opportunity to assess their work together as a team or may look at the communication between the vestry and congregation or staff. In addition to looking at inwardly focused ministries to congregants, the MMR may review outwardly focused ministries, such as food banks, meal service, or other community service programs.

A foundation for the review may already exist in a church's established values, mission, vision, and goals, and the Mutual Ministry Review may be used to assess how the work of ministry is linked to and fulfills them. If these have not been established, the leadership team may wish to engage in a discussion of driving values at the commencement of the process.

The Mutual Ministry Review process and tools are designed to be used in a variety of ways--however, it is important to be clear at the beginning about where the Mutual Ministry Review will focus and what key questions the review will be designed to answer.

Who Should be Involved in the Mutual Ministry Review?

This process is designed to be conducted by a team of ministry leaders, including the rector/vicar, selected professional staff, lay leaders, and vestry leaders. In the first step of this process, a decision should be made about who should be involved. It is recommended that the Mutual Ministry Review Team be no more than 20, but a team of seven to 12 is more workable than a larger one. On the other end of the scale, a group of less than five is probably not large enough to capture the broad interests and experiences of even a small congregation. Ideally, those on the team should be knowledgeable about the various ministries of the congregation, be able to be objective and open to new ideas, and have the time to commit to the task, approximately 12 hours, with slightly more for a few members who are involved in gathering information.

How Should We Conduct the Mutual Ministry Review?

The Mutual Ministry Review is designed to get feedback from several sources, and the leadership team may select from various options. Sources include:

- Existing information about the church and the community—current and/or historical;
- Congregational members (from a small, select group to the whole congregation);

- Various groups as a group, such as staff teams, vestry members, or program groups such as Sunday School teachers or Stephen’s ministers; and
- Individuals reflecting on their own ministries, including the rector, other staff, and lay leaders.

Tools and methods for getting feedback are provided in the Tools section of this Guide. We have designed a variety of surveys, reflection worksheets, interview guides, meeting agendas, and other tools for your use. Tools range from “drop dead simple” to more broad and complex. We have also included a format for conducting the review in a retreat setting and for a couple of short liturgies that may be used at various stages of the process.

Tools in the tool kit help you in the planning stage, including a getting-started check list, a Mutual Ministry Review decision/design form, and a values, mission, vision summary sheet. This step of the process is critical, because if it is left unclear, the whole process risks becoming unfocused and frustrating to participants. We heartily recommend taking the time needed to get the plan worked out in detail before moving through the process.

It is important to schedule the Mutual Ministry Review at a time when appropriate attention can be provided and with sufficient lead time for a high degree of participation.

Use of a Facilitator

The use of a trained facilitator is encouraged from outside the congregation to assist in doing the Mutual Ministry Review. Our experience has shown that, in most situations, conversation flows better and agendas go more smoothly if the person guiding the discussion does not have a stake in the outcome. In Section IV of this document, you will find more details on the selection, use, and payment of facilitators. The facilitator should be selected early and may be very helpful in designing your Mutual Ministry Review process and selecting the tools you will use. The facilitator may also somewhat reduce the work load of church leaders. The Diocese will provide a list of people trained in this process. Payment will vary, and the Diocese is prepared to support churches where necessary.

Communicating the Decision and Plan

Once the decision is made and the design complete, information on the Mutual Ministry Review should be communicated to both those on the Mutual Ministry Review Team and to the congregation as a whole. Several methods are recommended, including print, announcements on Sunday, and Website. Those who will be asked to

provide input should be informed through the communication to anticipate the request for input. The Mutual Ministry Review process can energize a congregation if it is well conducted and well communicated.

Congregants probably will want to know when they will receive information about the results.

STEP 2: KNOW THE CONTEXT

- What do we know about ourselves at this time?
- What do we see in our values, mission, vision, and goals? Do they provide a baseline for the review?
- What about the larger community and the church are important to our ministry at this time?
- What has changed or is changing?

Once the Mutual Ministry Review is designed for the specific study, a subgroup of the Mutual Ministry Review Leadership Team or others adept at gathering information of this type gather information to provide background and context on the ministry of the parish or mission. Basic information on the make-up of the church is important to review in this step. The Diocesan office has a summary of key descriptive information on each congregation that provides a wealth of data useful as background information on a church going through an MMR process. This report shows a ten-year pattern in such areas as attendance, pledging, and transfers and can be obtained on-line at: http://www.epicenter.org/edot/Link_to_Precept.asp?SnID=538198999.

The preliminary review to understand the current context of ministry may include a review of any existing values, mission, vision, and any goals set for this period of time. The Mutual Ministry Review Team may want to ask themselves if the work of ministry is aligned with the values, mission, and vision of the church. Decisions made during the Mutual Ministry Review process may impact goals for the future.

In addition to looking at the values, vision, and mission, leaders may want to “scan” the environment within and around your church to understand basic demographics of the congregation, and the community in which it exists, including any changes. There is “Context Diagram” in the tool kit to help gather information. If there are changes in the church or the local or regional community, these should be described and will be discussed during the Mutual Ministry Review process.

STEP 3: GET INPUT

- What do people tell us they value about our ministry?
- What do people tell us our strengths, gifts, and challenges are?
- What do people hope for and need in the future?

In this step various people in the congregation, especially those involved in or served by the ministries under review (such as those served in meal programs) will provide information. Again, a variety of tools are included in the Tools section, and those which fit the purpose of the Mutual Ministry Review may be selected. Tools may be modified to fit specific interests.

This stage of the Mutual Ministry Review may take several weeks in which interviews may be scheduled, surveys distributed, and responses collected. Then all the information must be tabulated and reviewed for key themes, trends, and ideas. It is recommended that a few members of the Mutual Ministry Review team work with the facilitator on the analysis and reporting of this information. A tool to summarize findings is available in the Tools section. The summary report should be distributed to Mutual Ministry Review Team members prior to the first meeting, specified in Step 4.

A word of caution here: It is possible to see all of these tools and think you want to hear from a lot of people on many different topics. Three things, however, are important to keep in mind. One, ask only for information that directly relates to the question being asked in the review and the areas of ministry being reviewed--no "fishing expeditions." And secondly, remember how much time it takes to collate and summarize data. And don't gather more data than you have time and resources to use. Finally, if people provide input, they want to know what was done with the information. Therefore, survey and interview results should be reported back at some point, and may be included in the final communication prepared in Step 7.

STEP 4: WHERE ARE WE NOW? (Session 1)

- What is the current state of our ministry, based on what we heard?
- What strengths, gifts, and achievements do we value for both the present and the future?
- What challenges, needs, and opportunities should be addressed?

Step 4 begins the heart of the Mutual Ministry Review process—discussion about where we are now as a church and how we currently see the work of ministry. This step is the first of three meetings that will move from the present to thinking about the future to planning for the future. Step 4 may be done as a single, stand-alone meeting or as an opening evening's meeting in a retreat. This meeting also can be conducted with the other two meetings (Steps 5 and 6) in a compressed setting at the church,

with the Step 4 meeting occurring on a Friday night followed by the two meetings of Steps 5 and 6 on Saturday. The compressed schedule may include a report to the congregation on Sunday. Another alternative is for the three steps to be scheduled over a series of weeks. It is best, however, if the meetings are not spread out more than two weeks apart to maintain continuity and freshness of information.

The focus of the Step 4 meeting is the current state of ministry. The meeting will begin with a review of information gathered, both from Diocesan statistical data and from any surveys, reflection worksheets, or interviews that are conducted. The meeting will focus on what is currently being done in the ministries reviewed, what is valued, the strengths and gifts expressed, and will also discuss the challenges, needs, and opportunities that exist and need to be addressed. An agenda for the meeting is provided in Tools.

STEP 5: WHAT IS OUR DREAM/HOPE/NEED FOR THE FUTURE? (Session 2)

- What is our wish/hope for the future?
- Where are we being called to serve?
- What should we enhance, add, stop, do differently?
- What are our priorities?

Step 5 is the second of the three meetings or the second session of a retreat. In this step, the focus is on the future. In a sense, this is the opportunity to dream and step beyond current practices to get at the heart of where people want to go in the future with regard to ministry. While it is important to eventually temper the thinking with the cold realities of resources and time, this step should open the door to people's heart-felt desires for ministry, building on what already exists or visioning for the future. A guided "meditation" is provided in the Tools for use at this stage; silence may be important to deep listening in this step, but simple questions may also open the pathways to the heart and the spirit.

STEP 6: WHAT WILL WE DO NOW? (Session 3)

- What do we need to do to achieve our future/dream?
- What resources do we need?
- Who needs to be involved?
- How will we know we are making progress?
- When will we do this again?

Step 6 is the third meeting in this series. Again, it may be done as a stand alone meeting or as the final session of a retreat or compressed meeting schedule. This is the meeting where dreams become realities. Decision authority and budgetary constraints should be made clear at the beginning of the meeting. In this meeting, actions will be

agreed upon to enhance the ministries reviewed and/or to go in new directions. For best results, a process should be agreed upon for checking in on plans. Finally, a time should be set for when the next Mutual Ministry Review will be conducted.

STEP 7: SUMMARY REPORT

- What do we want to tell people about the information gathered and the decisions made in the Mutual Ministry Review?
- How and to whom do we communicate results?
- How can we tell the story of our Mutual Ministry Review to best get the experience/information across?

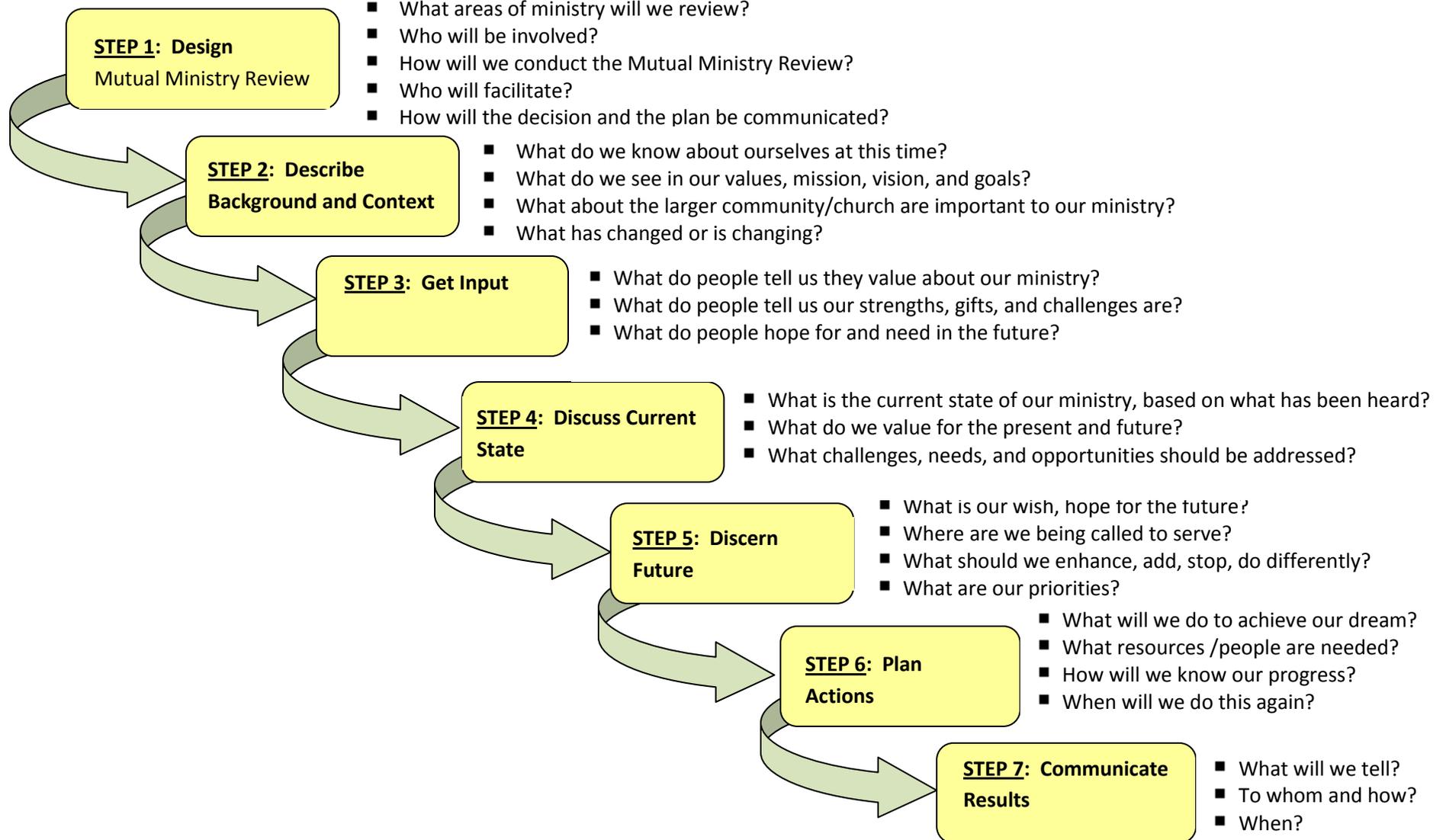
This brings us to the final stage of the Mutual Ministry Review, and one that is critical for broadening the impact of the Mutual Ministry Review, and moving into living out the dreams and plans. Once the meetings are completed, it is vital to let people in the congregation know about what was discussed and decided, as well as a sense of the process of the Mutual Ministry Review.

A communication document will be created in the final step. This can be a simple, report summary using the one-page template provided in Tools, or it may be done as a full-scale presentation. Work sheets (flip charts) from the Mutual Ministry Review meetings showing key discussion points may be posted at the end or even during the process; most likely, these will generate both interest and discussion. A presentation should be made to the vestry, staff, and other leaders who were not on the Mutual Ministry Review Team, and a presentation to the congregation as a whole is recommended. A brief summary may be included in the church's newsletter or bulletin and posted on its' website.

C. Process Diagrams

Following are two graphic layouts of the process that simplify the information discussed here. All the tools mentioned in the process description are found in the Tools section of this guide.

Mutual Ministry Review -- 7 Step Process



Mutual Ministry Review Process Table

Description of Steps Question addressed	Who is involved	Core Format and Tasks	Key outcomes	Core Tools (see Sect. 5)	Other Options
<p>Step 1: Design Mutual Ministry Review</p> <ul style="list-style-type: none"> ➤ What areas of ministry will we review? ➤ Who will be involved? ➤ How will we conduct the Mutual Ministry Review? ➤ Who will facilitate? 	<p>Head clergy sr. warden</p> <p>May include a small number of staff or other leaders</p>	<p>Meeting or series of meetings. Should include facilitator before finalizing this step.</p>	<ul style="list-style-type: none"> • Go/no-go decision • Select core or other options • Determine focus of MMR • Decide on tools to be used. • Decide who will provide input and participate 	<p>T1-3: Menus 1,2,3 (MMR Plans) Tools list T4: MMR Plan Template T5: Facilitator Agreement T6: Getting started check list</p>	<ol style="list-style-type: none"> 1. Establish larger (3-5 people) leadership team for more input on design of the MMR 2. Customize design plan and tools with facilitator 3. Follow with strategic planning 4. Add process to set values, mission, vision process prior to MMR*
<p>Step 2: Describe background & context</p> <ul style="list-style-type: none"> ➤ What do we know about ourselves at this time? ➤ What do see in our values, mission, vision and goals? ➤ What about the larger community / church are important to our ministry? ➤ What is changing or will change? 	<p>Assigned staff or rector/vicar.</p>	<p>Work is done by one or two people in a short period of time (no more than 1 month) prior to start of next steps.</p> <p>Congregational report available on line from website of the Episcopal Church of America.</p>	<ul style="list-style-type: none"> • An understanding and description of current status of congregation • A summary of VMV, goals 	<p>T7: Congregational Report (on-line) T8: Data Collector T9: VMV, goals summary</p>	<ol style="list-style-type: none"> 1. Additional custom selected metrics for church 2. Metrics for local area 3. Measurement of current status against present values, mission, vision and/or goals 4. Develop VMV, goals if don't exist

Description of Steps Question addressed	Who is involved	Format	Key outcomes	Core Tools (see Sect. 5)	Other Options
<p>Step 3: Get input</p> <ul style="list-style-type: none"> ➤ What do people value about our ministry? ➤ What do people tell us are our strengths, gifts, and challenges? ➤ What do people hope for and need in the future? 	<p>Clergy, sr warden, vestry, select staff /leaders, facilitator</p>	<p>Depending on design of MMR, data will be collected:</p> <ul style="list-style-type: none"> ▪ Clergy/sr. warden distribute and collect congregational survey or post on-line ▪ Reflection worksheets are distributed for completion ▪ Any focus groups, interviews are conducted ▪ Facilitator summarizes results. 	<ul style="list-style-type: none"> • Input from a variety of sources on impact of ministry • Brief presentation or summary report of results of input 	<p>T10-13: Reflection Worksheets T14: Congregational survey-short T15: Congregational survey-long T17: Staff/Team Survey T18: Outreach Survey T 19: Focus Group Guide T20: Interview Guide T21: Input Summary Template</p>	<ol style="list-style-type: none"> 1. Custom designed survey 2. Interviews by facilitator of key leaders (vestry, staff, etc.) 3. Interviews by vestry /staff/lay leaders (up to 5 congregants each) 4. Hold several focus groups by area of ministry or other congregational segment
<p>Step 4: Where Are We Now?</p> <ul style="list-style-type: none"> ➤ What is the current state of our church and ministry? ➤ What strengths, gifts, do we value? ➤ What challenges, needs, and opportunities do we want to address? 	<p>Clergy, vestry, select staff, MMR Leaders, facilitator</p>	<p><u>Meeting 1 (1-3 hrs)</u> Facilitator present results of Step 3. Participants review & discuss input. Group summarizes:</p> <ul style="list-style-type: none"> – Achievements – Strengths – Challenges – Value of ministry 	<ul style="list-style-type: none"> • Agreement on key descriptors of current state, gifts, strengths, achievements, challenges, value 	<p>T22: Meeting 1 Agenda T21: Input Summary (review) T23-24: Celebration liturgy</p>	<ol style="list-style-type: none"> 1. Abbreviated MMR Format (T38) 2. Retreat outline (T39) 3. Meeting with Staff to discuss results from their input 4. Various ministry groups follow agenda in T22 (Meeting 1) and provide resulting input into larger MMR setting (e.g. Christian Ed, outreach, youth, Stephen Ministry). 5. Conduct MMR with volunteers from congregation in a series of Sunday open meetings

Description of Steps Question addressed	Who is involved	Format	Key outcomes	Core Tools (see Sect. 5)	Other Options
<p>Step 5: Discern the future</p> <ul style="list-style-type: none"> ➤ What is our wish/hope for the future? ➤ Where are we being called to serve? ➤ What should we enhance, add, stop, do differently? ➤ What are our priorities? 	<p>Clergy, vestry, staff, MMR Leaders, facilitator</p>	<p><u>Meeting 2 (1-3 hrs)</u> Discuss questions Discuss “dreams”, hopes, needs for the future Discuss what to add, modify, continue, or stop</p>	<ul style="list-style-type: none"> • Agreement on key descriptors of future state • Identification of gaps, needs selected to be address in the future • Identification of new ministries and any to be stopped • Identification of priorities 	<p>T25: Meeting 2 Agenda T26: Future of Ministry Reflection Worksheet T27: Envisioning the Future Meditation T28: Prioritization Worksheet T29: Future of Ministry Summary</p>	<ol style="list-style-type: none"> 1. Abbreviated MMR Format (T37) 2. Retreat outline (T39) 3. Level 2 – Meeting guide for other group meetings. 4. Continue whole church MMR with 2nd meeting (T25) 5. Use this step as part of a strategic planning / goal setting process 6. Get input beyond those MMR Leaders to broaden vision via Future Reflection Worksheet (Tool 26) 7. May solicit input (ratings) on priorities prior to final planning meeting
<p>Step 6: Plan actions & resources</p> <ul style="list-style-type: none"> ➤ What will we do to achieve our future/dream? ➤ What resources and people are needed? ➤ How will we know we are making progress? ➤ When will we do this again? 	<p>Clergy, vestry, select staff / MMR Leaders, facilitator</p>	<p><u>Meeting 3: (1-3 hrs)</u> Participants to create a plan with commitments, assignments, dates, & method for monitoring as time allows. Whole group calendaring techniques may be used.</p>	<ul style="list-style-type: none"> • Agreement on steps, changes, actions, decisions • Documentation of agreed upon actions, decisions • Monitoring plan 	<p>T30: Meeting 3 Agenda T31: Action Plan T32: “Keeping it Going” Summary T33-34: Closing Liturgy</p>	<ol style="list-style-type: none"> 1. Retreat Outline 2. Level 2 – conduct with separate areas of ministry, and then leadership for whole church 3. Continue whole church MMR process with Meeting 3 (T30) 4. Do as part of strategic/annual planning process* 5. Hold commissioning service at Sunday liturgy

Description of Steps Question addressed	Who is involved	Format	Key outcomes	Core Tools (see Sect. 5)	Other Options
<p>Step 7: Communicate results</p> <ul style="list-style-type: none"> ➤ What do we want to tell people about the MMR process, information, and outcomes? ➤ How, when and to whom will we communicate results? ➤ Who will do this? 	Facilitator with input from clergy, sr warden and MMR Leaders	Uses a variety of communication methods to provide leaders and congregants with information about the outcome of the MMR, including: <ul style="list-style-type: none"> • Verbal reports at vestry meeting and service • Written report • Bulletin announcement Report to Diocese that MMR has been conducted.	Facilitator drafts report reviewed by clergy, sr warden; report is revised and distributed per plan.	T35: Summary report template T36: Communication plan check list	<ol style="list-style-type: none"> 1. Provide Diocesan office with Summary Report 2. Provide summary to vestry and other lay leaders 3. Provide summary to whole congregation 4. Show/post working documents as process is carried out 5. Incorporate detailed report into strategic or annual plan 6. Review every 3 months

Note: Alternative formats for a Mutual Ministry Review found in the Tools section include:

- ▶ An MMR focused on the working relationship of vestry/wardens and clergy (Tool 11, Tool 37)
- ▶ An abbreviated MMR (Tool 38) that allows for a high level review to be conducted in one or two meetings
- ▶ A retreat format that accomplishes Steps 4 through 6 in a retreat setting (Tool 39). A retreat outline is provided in the tools section later in this Guide. This might also be a good focus for a vestry or lay leader retreat.
- ▶ Comments on closing out a ministry (Tool 40)

Comments: A Mutual Ministry Review may also be used as a first step in strategic or annual planning for a church or as the beginning of a “re-visioning” process in which a vision is established or re-established and the mission and values are drafted, clarified or reaffirmed. It may also follow a visioning process to enable leaders to understand ways in which ministry is aligned with or divergent from the defined vision.

* Indicates other processes and tools provided by the Diocese of Texas.

D. Mutual Ministry Review Timing and Frequency

This process is designed to be repeated rather than be a one-time assessment. Because of the variety of tools and the design of the process itself, we believe it can be kept fresh, even if used every year. A congregation may want to conduct a baseline-Mutual Ministry Review the first year, and then tackle certain areas of ministry in the following years. Every four to seven years, the congregation can benefit from a more in-depth Mutual Ministry Review that uses a broad array of the tools to look at more ministries or to look more deeply into the overall effect of the ministries of the church.

Ever-greening

Several definitions of the term evergreen are intended for the Mutual Ministry Review process. First, it is intended that the Mutual Ministry Review process should itself be continually updated as information from users is collected, so that the process has face validity for users and contains needed flexibility. Secondly, it is intended that the process will be repeated by the user, either annually or every few years. Thirdly, it is intended that the application of the process should be modified each time it is used, to ensure that it fits the current state of ministry. In other words, the process is not to be applied in the same way it was previously without giving consideration to the way ministry is currently being done. The overall goal of the Mutual Ministry Review design team was to create a process that is simple enough to be easily used, flexible enough to fit various needs and desire for depth, and to be us

IV. FACILITATION

*To the soul, there is hardly anything more healing than
friendship.*

Thomas More (1779 - 1852)

A. The Role Of The Facilitator

The Mutual Ministry Review process is designed to be carried out with the assistance of a qualified facilitator. The facilitator's role is negotiated by the rector and/or senior warden with the facilitator, but generally includes these things:

- Assistance with planning the MMR
- Tool selection and modification
- Conducting surveys, focus groups, and interviews
- Detailed meeting design
- Meeting facilitation
- Monitoring the process (shared role)
- Reporting results

The role of the facilitator is simply to guide and support the process so that it accomplishes its objective and moves at an appropriate pace. The rector and senior warden (or small group of Mutual Ministry Review designers) lead and "own" the process; it is their role to determine the overall purpose and scope of the MMR, with input from others. It is this Mutual Ministry Review Planning Team that will also select those to be involved and recruit them to serve on the Mutual Ministry Review Leadership Team (see Process section for more description). The clergy and senior warden will also decide how much information and input is desired in the 2nd and 3rd stages of the process. As the Mutual Ministry Review is conducted, it is also these few, along with the facilitator, who will monitor the progress of the Mutual Ministry Review, to ensure that it stays focused the initial purpose and scope as designed.

The facilitator's role needs to be made clear both to the congregational leaders involved in the Mutual Ministry Review and to the facilitator. The Facilitator Agreement (Tool 5) has been designed to capture the particulars of the assistance provided by the facilitator to the church. Activities which are typically provided by a facilitator in this setting include the following:

1. ASSISTANCE WITH PLANNING THE MMR. The facilitator should be brought in at the very beginning of the process to assist in clarifying the scope and design of the Mutual Ministry Review process. To help with the planning process three

menus have been developed and are provided in the Tool Section of this guide. Ideally, the facilitator will be asked to give feedback on whether or not the Mutual Ministry Review goals are clear and if the scope is--neither too narrow nor too broad for the purpose of the Mutual Ministry Review and resources of the church. The clergy and the Mutual Ministry Review Planning Team maintain the responsibility to define the goals of the Mutual Ministry Review.

The facilitator will also work the Mutual Ministry Review Planning Team to design the overall sequencing and flow of the meetings and to identify requirements for meetings, including logistical support and materials. The facilitator may make suggestions on the size of the Mutual Ministry Review Leadership Team and types of people involved, but will not be involved in the selection or recruitment of Mutual Ministry Review Leadership Team members.

2. TOOL SELECTION AND MODIFICATION. The facilitator can give valuable insights on the selection of the appropriate number and types of tools. Again, the tools used need to fit the purpose and scope of the review as well as the size and resources of the congregation. The facilitator can ensure that the pre-meeting information gathering is neither overly ambitious nor too superficial. If some minor modifications of the tools are necessary to meet the planned goals, the facilitator can make those changes as well. The final version of all modified tools, however, should be reviewed and approved by the Mutual Ministry Review Design Team (or someone appointed by them for this purpose) prior to usage. Facilitators should not be expected to design new or bring completely different tools to a process. Any identified need for new or different tools will need to undergo a design and testing process separate from a current Mutual Ministry Review process.
3. CONDUCTING SURVEYS, FOCUS GROUPS, AND INTERVIEWS. The Mutual Ministry Review Leadership Team, or some portion of it, will be responsible for the actual administration of any surveys. The Team will communicate the purpose, logistics, time line, and reporting of the survey to those being asked to complete it. To maintain the highest level of response, completed surveys should be sent to the facilitator for compilation. For the highest level of participation and candid feedback, surveys should be anonymous.

If a focus group (Tool 19) is part of the Mutual Ministry Review design, the facilitator will conduct however many are planned as laid out in the initial planning step. If interviews are to be conducted, the facilitator may do those or may train others on the Mutual Ministry Review Leadership Team or vestry to conduct interviews. The facilitator will collate the data and may present it at the initial Mutual Ministry Review meeting. It is up to the MMR Leadership Team,

however, to analyze and interpret the meaning of the variety of information that will be collected. The facilitator may have ideas and may suggest possible interpretations based on their experience with analyzing survey responses, but conclusions are to be determined by the MMR Leadership Team.

4. DETAILED MEETING DESIGN. In the Tools section are meeting agendas for the 3 meetings (Tools 22, 25, and 30) which are the heart of this process. In addition, there is an agenda for an abbreviated MMR combining these 3 meetings into one (Tool 38). These agendas are “bare bones” and it is expected that any agenda will require adaptation for each review process. The facilitator will be expected to work with the MMR Leadership Team in creating a more detailed meeting plan for each of the three meetings. Recommendations for meetings and more detailed agendas may be found in the Facilitator Guide (a separate document), available through the Episcopal Diocese of Texas, Office of Leadership Development. The length the meetings, the flow of the agenda, activities, and discussion will be determined by the facilitator and will be aimed at accomplishing the goals stated by the Planning Team at the initiation of the review process. The detailed agendas, once prepared by the facilitator, should be reviewed with the rector and senior warden prior to the meeting. Sufficient copies of the agendas should be prepared and distributed to participants prior to the meeting, but also made available at the beginning of the meeting session. Adapting the suggested agendas should ensure meetings will be designed with a variety of methods and approaches to engender discussion with a high level of participation and interest. Clergy or the MMR Leadership Team, however, will need to make decisions on any prayer, Bible study, or liturgies to be included for meeting sessions.
5. MEETING FACILITATION. One of the most important responsibilities of the facilitator is the actual conduct of the meetings. It is the facilitator that will guide the meeting through its planned design to ensure that the outcomes of the meeting are accomplished, participation is high, and that meetings are moving at an appropriate pace—not so fast that people get frustrated and not so slow that they get bored. Good facilitation is both art and science, which is why it is important to have a person with training and skill in facilitation to work with the MMR Leadership Team. It is also the role of the facilitator to ensure that the meetings are directed toward the overall purpose of the MMR, and not branching off in unplanned directions without a conscious decision to do so.
6. MONITORING THE PROCESS: Monitoring the process is a shared role, between the facilitator and those who set the purpose and scope and design. The facilitator may make recommendations about adjustments as the MMR unfolds, and may incorporate new information or other changes that are desired by the

MMR Leadership Team. It is very important, however, that the process stay focused on purpose and on schedule to avoid having the Mutual Ministry Review go past the interest level and attention span of those involved. If unanticipated areas requiring further review crop up, it is better to hold those for a separate review, rather than derail the whole process. It is expected, however, that small changes will need to be made to ensure that the Mutual Ministry Review meets its purpose and satisfies the needs of the congregation and its leaders. The facilitator, who is focused on the process flow rather than conclusions drawn, is an invaluable guide in ensuring that modifications are successfully incorporated.

7. **REPORTING.** The final role of the facilitator is that of reporting. If flip charts are used during the meeting, either the facilitator or someone on the Mutual Ministry Review Leadership Team or church administrative staff may transcribe the information from that meeting. If someone other than the facilitator transcribes the flip chart meeting notes, the facilitator should review them and put these notes into a final, coherent format and return them to the clergy or senior warden for distribution to meeting participants.

In addition, a final report of the review process will be drafted by the facilitator and finalized in close consultation with the rector and senior warden or the Mutual Ministry Review Design and/or Leadership Teams. This report should highlight the purpose of the Mutual Ministry Review, name those involved, briefly describe how it was conducted, and identify decisions and plans made to appreciate, support, enliven, and strengthen the ministry of the church going forward. The facilitator will also inform the Coordinator of Facilitators appointed by the Diocesan Office of Leadership Development that an MMR has been completed. It is the responsibility of the Mutual Ministry Review Leadership Team, clergy, and senior warden to communicate to the congregation and others about the Mutual Ministry Review process and outcomes.

B. Criteria for Selection

The role of the facilitator is very important to the effectiveness of the process. A good facilitator can be very helpful in creating a clear plan that rolls out smoothly. A poor facilitator, on the other hand, can generate frustration and derail the process. For that reason, we recommend the facilitator for the Mutual Ministry Review process should meet the following criteria:

- Have maturity as a facilitator and as a person
- Have a proven track record of skillful facilitation

- Be trained as a facilitator on the MMR process of the Diocese of Texas
 - Be willing to use the process and the tools as designed, with minor modifications as needed
 - Be willing to submit any significant tool changes or suggestions for additional tools to the MMR Design Team prior to use in a review process
 - Will follow-through on commitments as scheduled
 - Is willing to be held accountable for the role and the results associated with that role
 - Understand the importance of confidentiality and have a strong commitment to maintaining anonymity as promised throughout the process
 - Be objective throughout, with no stake in the purpose, scope, decisions, outcomes, or action plans developed from the MMR
 - Be able to effectively deal with group differences, strong personalities, and other factors common in group dynamics
 - Be knowledge about Episcopal Church

C. How to Identify and Select a Facilitator

The Diocese of Texas has provided training to a group of people who meet the criteria for facilitators discussed above, and are ready to support a Mutual Ministry Review. To find a facilitator, contact Deborah Ottsen, Mutual Ministry Review Coordinator at 979-337-4717 or by email at hrhelplink123@aol.com. The Diocese of Texas Office of Leadership Development may also serve as a resource. You can contact that office at 1-713-520-6444 or on-line at the Diocesan website: www.epicenter.org and indicate interest in a Mutual Ministry Review facilitator. The leadership of the church conducting the Mutual Ministry Review, not the Diocese, are expected to contact and negotiate the particulars of the Facilitator's Agreement (Tool x) with the facilitator. If for any reason that congregation wants assistance from the Diocese, they may request it.

Those churches' Mutual Ministry Review Planning Team may want to talk with several facilitators and/or meet a potential facilitator in person before making their decision about whom they will use. The Planning Team is welcomed to request a resume or summary biography of the facilitator from the Coordinator of Facilitators, listed in the Appendix of this Guide. It is important that the rector and the senior warden as well as the Planning Team feel comfortable with the facilitator, and have

confidence that she or he will provide the kind of support desired for their Mutual Ministry Review process.

D. Facilitators versus Consultants

A facilitator has the necessary expertise to guide the MMR process, to keep the process and meetings moving and on topic, and to ensure that discussion focuses on the purpose and scope of the planned review. The facilitator, however, is not expected to be a consultant. The role of consultant would be to bring in expert knowledge of how a Church can operate effectively, and to offer guidance in moving a congregation to its designated goals. While a church may at some point want the services of a consultant that is not the intention here, nor is that part of the role of the facilitator. The facilitator is expected to provide support and guidance on the process, not be an advisor on decisions or actions. If consultation is needed, the rector or senior warden may contact the Office of Leadership Development where a list of knowledgeable consultants may be obtained. Generally, that the MMR Leadership Team itself, with the appropriate information and time for discussion, has the expertise needed to make decisions and plans to positively affect ministry for the future.

E. Evaluation of the Facilitator

It will be helpful to both the facilitator and the MMR Leadership Team to evaluate the work of the facilitator near the mid-point in the process and again at the end of the process. The mid-point evaluation will allow the facilitator to make adjustments if they are needed. The final evaluation will provide information both to the facilitator and to the Diocese on how that person's work benefited the overall process. Feedback to the Diocese will enable it to maintain a list of qualified facilitators and have accurate, timely information about those facilitators. A copy of the final evaluation or a summary of it should be provided to the Diocese. The mid-point and final evaluation forms are included at the end of this section.

In addition, the facilitator will probably ask for verbal feedback at the end of each meeting, whether a feedback form is used or not. By providing the facilitator with candid information and suggestions for modifications throughout the MMR process, she or he can make any necessary adjustments.

F. Payment of the Facilitator

The rate paid to the facilitator is negotiated with the facilitator by the hiring church. In many cases, the fee would cover a consultation meeting for planning the process (may be a telephone meeting), collation of results from tools used facilitation of meetings, meeting notes of each meeting and a final summary report at the end of the process. Please note that this level of support may be time consuming and affect the fee charged by the facilitator. The church may negotiate to skip some of these tasks or do them in another way. If the church conducting the MMR wants a more in-depth process, using multiple tools, including interviews, and/or surveys of large numbers of respondents, then the fee would be expected to be higher. Fees may range from \$300 to \$1,000 depending on the size of the review and the amount of time required.

The cost of the facilitator's fee is expected to be agreed upon at the outset, specified in the Facilitator Agreement (Tool 6), and paid by the church conducting the process. Payments should be made in 2 installments, one at the mid-point and the second at the end of the process. Final payments should be paid within 30 days of the completion of the process. The Diocese of Texas is prepared to share the cost of the facilitator's fees if the church is unable to cover fully the fees.

It is expected that expenses incurred by the facilitator for work on this process would be covered as well, such as mileage (at current IRS rates) or travel expenses, lodging, meals, and any parking fees/tolls that occur. The facilitator may waive that reimbursement, but agreement should be negotiated before the process begins, and specified in the agreement. Expenses related to the review process are expected to be covered fully by the church. A format for an agreement between the church and the facilitator follows.

Facilitators Agreement

<p>Church:</p> <p>Address:</p> <p>Rector: Phone/Email:</p> <p>Sr. Warden: Phone/Email:</p>	<p>Facilitator:</p> <p>Address:</p> <p>Phone:</p> <p>Email:</p>
<p>Purpose of Engagement: The MMR is a facilitated process for _____ Church, _____, Texas for the purpose of _____:</p> <p>The MMR is designed to address these questions:</p> <ul style="list-style-type: none"> ➤ _____ ➤ _____ ➤ _____ ➤ _____ ➤ _____ 	
<p>Dates of Services:</p> <p>Delivery of customized tools: by _____</p> <p>Meeting 1:</p> <p>Meeting 2:</p> <p>Meeting 3:</p> <p>Delivery of Report:</p>	<p>Payment:</p> <p>Fee for Services: _____</p> <p>Paid by:</p> <ul style="list-style-type: none"> ▶ _____ Church ▶ Reimbursement for travel and any other costs ▶ Within 14 days of completion of MMR
<p>Other aspects of agreement:</p> <ul style="list-style-type: none"> ▶ Selection and modify MMR tools, distribute by email, tabulate results ▶ Summary of results from surveys, interviews, and or focus groups (Step 3) ▶ Preparation for ___ meetings ▶ Facilitation of ___ meetings ▶ Follow-up report of notes and agreements from meetings ▶ Report to Diocese that MMR has been completed ▶ On-going communication with rector and Sr. Warden (others as agreed) 	

<p>Signature of Rector:</p> <p>Date:</p>	<p>Signature of Facilitator:</p> <p>Date:</p>
<p>Confidentiality: All information gathered in the process of facilitating an MMR is confidential to the church doing the review and will be protected as such. Any data, survey or interview results, points of discussion, and such items may not be disclosed except as intended and specified by this plan. In addition, any commitments to anonymity or confidentiality given in interviews or discussions are expected to be honored by both the facilitator and those church leaders involved. All reporting is expected to be by themes and anonymous.</p>	

FACILITATOR FEEDBACK FORM (mid- point)

Please complete this form providing input to the Mutual Ministry Review facilitator.

ITEM	RATING				
	Not at all true	2	3	Somewhat true	4
1. I am satisfied with the MMR process thus far.	1	2	3	4	5
2. I believe we will accomplish the goals of the MMR by the end of the process.	1	2	3	4	5
3. The facilitator has helped me and others to fully participate in this process.	1	2	3	4	5
4. In general, I am satisfied with the pace of our meetings.	1	2	3	4	5
5. The way the meetings are designed is holding my interest.	1	2	3	4	5
6. We have had the information we need for informed discussions in the MMR process.	1	2	3	4	5
7. I feel comfortable enough in the meetings to disagree, if that is my opinion.	1	2	3	4	5
8. The MMR Leadership Team is staying on task with the discussion in our meetings.	1	2	3	4	5
9. The content of the meetings is appropriate for this step.	1	2	3	4	5
10. I am finding participation in the MMR process meaningful.	1	2	3	4	5

What do you find helpful in the process and facilitation?

What would you like to see added or changed?

Any other comments?

FACILITATOR FEEDBACK FORM (at Completion)

Please complete this form providing input to the MMR facilitator.

ITEM	RATING				
	Not at all true	2	Somewhat true	4	Very true
1. Overall, I am satisfied with the way the MMR process was facilitated.	1	2	3	4	5
2. I believe we accomplished the goals of the MMR with the help of the facilitator.	1	2	3	4	5
3. The facilitator has helped me and others to fully participate in this process.	1	2	3	4	5
4. The discussion was open, lively, and meaningful.	1	2	3	4	5
5. I feel good about what we accomplished through this process	1	2	3	4	5

I see these gifts and strengths in our facilitator.....

The facilitator helped us move through this process by....

Looking back on the whole process, I would have added or changed.....

Other comments....

V. APPENDIX

CONTACT INFORMATION

MUTUAL MINISTRY REVIEW DESIGN TEAM

Mary MacGregor, Director of Leadership Development, Episcopal Diocese of Texas
Email: mary@epicenter.org Phone: 713-353-2136;
800-318-4452, ext. 1028

Deborah Ottsen, Mutual Ministry Review Coordinator
Email: hrhelplink123@aol.com Phone: 979-337-4717

Betsy Aylin, PhD, MMR Team Leader and Designer
Email: betsy.aylin@earthlink.net Phone: 512-695-4431

Ms. Linda Astala
Email: astala@flash.net Phone: 281-443-1902

Mr. David Collins
Email: davidcolns@aol.com Phone: 903-935-6965 (home/office)
903-407-9090 (cell)

The Rev. Evelyn Hornaday
Email: evelyn.hornaday@gmail.com Phone: 281-499-9602 (office)
281-302-5967 (home)

The Rev. Jim Liberatore
Email: frjimbo@msn.com Phone: 281-485-3843

The Rev. Russ Oechsel
Email: roeschel@sbcglobal.net Phone: 281-859-1669

Ms. Deborah Ottsen, SPHR
Email: hrhelplink123@aol.com Phone: 979-337-4717 (cell)
979-836-7263 (home)

Ms. Michele Parker-Schauer
Email: Michele.parker@stmarks-houston.org Phone: 713-664-3466 (home)

Ms. Suzy Spencer
Email: suzymspencer@yahoo.com Phone: 832-569-4855

FOOTNOTE AND WEB REFERENCES

- ¹ Rule for a New Brother, Templegate Publishers, 1973
- ² Book of Common Prayer, p. 855
- ³ Robert Voyle definition from interview. See website listed below for further information.
- ⁴ Book of Common Prayer, p. 304-5
- ⁵ W.L. Leifield. Elwell Evangelical Dictionary
- ⁶ Teresa of Avila, Interior Castle, p.79
- ⁷ Mary MacGregor , Pamphlet “On Different Size Churches”. Diocese of Texas. (included in this appendix)

Biblical references are from the New Revised Standard version of scripture.

Diocese of Texas Website link for MMR Guide and Tools:

http://www.epicenter.org/edot/The_Iona_Center_.asp?SnID=1318500834

Diocese of Texas for Statistical Report (LOBSTER) by congregation:

http://www.epicenter.org/edot/Link_to_Precept.asp?SnID=538198999

Development Office of the National Episcopal Church, background on MMR:

http://www.episcopalchurch.org/1521_7369_ENG_HTM.htm

Robert Boyle on Mutual Ministry Review using Appreciative Inquiry:

<http://www.clergyleadership.com/consulting/mmv.html>

ANNOTATED REFERENCES

Bass, Richard (ed.). **Leadership in Congregations**. Herndon, Va.: The Alban Institute, 2007. A collection of articles on leadership in congregations of all types—small, non-staff, larger. Particularly helpful articles included, “action and reflection” as well as articles on clergy power and authority. Interesting article on “A Congregation of Mystics.”

Brinckerhoff, Peter. **Faith-Based Management: Leading Organizations that are Based on More than Just Mission**. New York: John Wiley Press, 1999.

Discusses what distinguishes “faith based” organizations from others, including non-profit, including mission, governance, finance, staff, and volunteers and suggests managing a faith based organization is different. Provides guidance in key areas. Seeks to have us examine every aspect of church life from a spiritual/biblical perspective rather than assuming secular or even non-profit practices and approaches are appropriate.

Bushe, Gervase R. “*Appreciative Inquiry is Not (Just) About the Positive.*” In **OD Practitioner**, Vol. 39:4, pp. 30-35, 2007. Describes ways Appreciative Inquiry is misused by stopping with identifying positives in a given situation. Argues that the real value of Appreciative Inquiry is in the use of generative questions which build rapport, sense of safety, and lead to a new vision of the future. Contrasts a focus on problem solving (the traditional approach) with one on generativity.

Diehl, William. **Ministry in Daily Life: a practical guide for congregations**. Alban Institute, 1996. Asserts that laity will have the most influential role to play in the 21st century. Discusses ways laity will be empowered and supported by their churches to be ministers in daily life in a wide variety of ways and circumstances. Talks about making creating an intentional perspective of mission for people as they live their ordinary lives.

Easum, Bill. **The Complete Ministry Audit**. Nashville, Abingdon Press, 2006.

A guide to help churches review their performance and make recommendations. Includes many surveys—both open ended and rated for everything from church facilities to the work of staff. It is built around certain “basic laws of congregational life.” Includes a CD Rom with soft copy of the instruments. Incorporates a traditional “medical diagnostic” approach to assessment.

Finlayson, Andrew. **Questions that Work**. New York: American Management Association. 2001.

Written for a secular audience, describes the importance of asking questions to understand impact, status, and importance of what is occurring. Provides detailed guidelines for creating a “questioning culture” and specific types of questions to ask in particular situations.

Freeman, Lindsay Hardin (ed.). **Doing Holy Business: The Best of Vestry Papers.** New York, NY: Church Publishing Incorporated, 2006. A collection of essays on various aspects of church life and the service of the vestry. Of particular interest were articles on congregational health and vitality, vestry roles and responsibilities, spiritual leadership, and conflict and controversy.

Goldsmith, Marshall. **Try Feedforward Instead of Feedback.** Article from website (www.MarshallGoldsmithLibrary.com). Discusses the value of giving feedback on what is needed for the future, rather than on past behavior. Gets input from receiver first on a few things they would like to be better at in the future. Suggests steps to make changes happen.

Goldsmith, Marshall and Howard Morgan. **Team Building without Time Wasting.** Begins with a 2 question assessment on how well the team is doing and how well it needs to do. Focuses efforts on where there are discrepancies. Team identifies 2 behaviors that would improve team behavior and then prioritizes. Each team member requests ideas for 2 areas of personal change. All make commitments. Whole team process takes very little time. Monthly follow up reports from each team member. Follow up assessment after one year.

Hanson and Palmer (ed). **Pastor and People: Making Mutual Ministry Work.** Minneapolis: Augsburg Press, 2003. A collection of articles on ministry, including pastoral ministry and expectations of ministry.

Has a chapter devoted to mutual ministry, which it defines as: "Mutual ministry is a mission-oriented enterprise that is characterized by a broad vision of ministry and a healthy practice of mutuality." Includes discussion on the role of MM committee and the use of small groups. Uses metaphor of "scanning" to suggest that an MM committee watch for ministry needs and the ways those are being met. Includes a chapter on "ministry review and performance evaluation" which describes the importance of starting with clear and common expectations. Focused on the review of the pastor but includes a brief description of a goal-based mutual ministry review.

Herrington, Bonem, and Furr. **Leading congregational change: A Practical Guide for the Transformational Journey.** San Francisco: Jossey-Bass, 2000.

Points to the need for change to address the declining population of church goers. Built around the questions, "How do we transform declining congregations into Christ-like bodies that display the power of the Gospel in our communities?" Looks at how churches respond to the need for change and yet stay true to the core teachings of scripture. Based on work done with Baptist churches in Houston. Suggests that models of assessment influence recognition of the need for change. Proposes a model of congregational transformation. Process: 1) making personal preparation, 2) creating urgency, establishing the vision community, 3) discerning the vision and determining the vision path, 4) communicating the vision, 5) empowering change leaders, 6) implement the vision, 7) reinforcing momentum through alignment. Process supported by

learning disciplines of “mental models”, team learning, systems thinking and creative tension (a la Peter Senge, the Fifth Discipline).

Magill, Samuel. **Living into our Ministries: The Mutual Ministry Cycle.** A collaborative publication by Cornerstone, A Ministry of the Episcopal Church Foundation and the Church Deployment Office. A comprehensive guide to what is being developed for Mutual Ministry Review throughout the US. Specific approaches outlined in the Literature Review table of this report. Gives background and sets a framework for what should be done, how and by whom, as well as what does not fit an MMR.

Shelley, Marshall (ed.). **Leading Your Church Through Conflict and Reconciliation.** Minneapolis: Bethany House Publishers, 1997. Discusses causes of conflict in churches, how to keep them from getting started and resolving when they arise. Talks about church conflict resulting from challenges at varied stages of church life/size and as a result of changes. Provides ideas for avoiding and solving conflict including: 1) expecting it, 2) knowing likely conditions, 3) open conversation, and 4) decisive action where necessary.

DEFINITION OF MINISTRY ROLES

The catechism and the Canons of the Episcopal Church of America define the various forms of ministry as follows³:

- The ministry of **lay persons** is to represent Christ and his Church; to bear witness to him wherever they may be; and, according to the gifts given them, to carry on Christ's work of reconciliation in the world; and to take their place in the life, worship, and governance of the Church.
- The ministry of a **priest** is to represent Christ and his Church, particularly as a pastor to the people; to share with the bishop in the overseeing of the Church; to proclaim the Gospel; to administer the sacraments; and to bless and declare pardon in the name of God.
- The ministry of the **bishop** is to represent Christ and his Church, particularly as an apostle, chief priest, and pastor of a diocese; to guard the faith, unity, and discipline of the whole Church; to proclaim the Word of God; to act in Christ's name for the reconciliation of the world and the building up of the Church; and to ordain others to continue Christ's ministry.
- The ministry of a **deacon** is to represent Christ and his Church, particularly as a servant of those in need; and to assist bishops and priests in the proclamation of the Gospel and the administration of the sacraments.
- The **vestry** shall be agents and legal representatives of the Parish in all matters concerning its corporate property and the relationship of the Parish to its clergy.

ONE SIZE DOES NOT FIT ALL!

Congregational Size and Dynamics

Congregations by Size (ASA)

In the Episcopal Diocese of Texas

Type	Average Sunday Attendance (total of all services)
Family	1-75
Pastoral	76-150
Transitional	151-225
Program	226-450
Resource	451+

WHY PEOPLE JOIN CHURCHES TODAY IN AMERICA

- ❖ Most often come at a time of life transition: marriage, birth of a child, crisis, illness, death.
- ❖ When they move to a new community, seeking friends, networks, connections
- ❖ When searching for transcendent meaning to life, hoping to find answers, they look for a worshipping, caring community that demonstrates God's love
- ❖ They want support for their children and help in raising them
- ❖ Rarely join just to be associated with a church as was often the case in previous times

Primary references:

Sizing Up the Congregation, Arlin Rothauge

The Small Church is Different, Lyle Schaller

The Rev. Kevin Martin, Director, Vital Church Ministries

Mary M. MacGregor, Director of Leadership Development, Episcopal Diocese of Texas

FAMILY

- **1-75** average Sunday attendance
- Often located in rural, small towns
- One cell unit
- Historically like a family with strong parental figures of a matriarch and/or patriarch (influencers)
- Priest serves in a pastoral role as a chaplain
- Offers a strong sense of belonging to its members
- Growth potential: difficult

WHY PEOPLE JOIN

- To be a part of a small congregation that knows everyone and deeply cares for them
- They come because of the church's reputation in the community. The church is known for something it does very well – particularly an outreach ministry to the community
- They know persons who are members – often family relatives or friendships
- Find that members have a lot in common with them socially, economically, culturally
- The church demonstrates a loving and caring spirit of Christianity

GAINING ACCEPTANCE

- Newcomers may be greeted warmly, but it is usually the “influencers” or “gatekeepers” in the congregation who overtly or subtly accept new persons
- Clergy and “influencers” need to make public overtures of acceptance in order for the congregation to receive newcomers
- Entry more like adoption than social acceptance, takes a while to feel included
- Efforts must be made to interface with the “influencers” to fully gain acceptance
- Newcomers need to be made aware of the heritage and traditions of the congregation
- Newcomer must take advantage of social opportunities and get to know everyone and how this “family” acts when it is together

VESTRY/BISHOP'S COMMITTEE AND STEWARDSHIP

- Size: 6-9 members
- Vestry members are often the leaders AND doers of ministry
- “What has to be done and who will do it?” is the question most often asked on the vestry
- Strong orientation toward maintenance issues
- Approvals for actions are significantly impacted by the “influencers” opinions
- Casual group interaction, planning, loose decision making procedures
- Difficult to plan too far out, goals tend to be simple
- Stewardship has historically been dependent on the matriarchs/patriarchs. As these persons die, a void of a healthy giving pattern may remain for the whole congregation
- NEVER enough money to do what they would like to do, often a lot of fund raising activity vs. well done annual appeal to raise the level of individual giving
- Lots of vestry/bishop's committee members return to serve again and again

LEADERSHIP

- Long tenured matriarchs and patriarchs have dominated. If these strong, influencing rolls have not been passed down to their children there is an opportunity for the members of the congregation to move into areas of ministry they are gifted or passionate about
- Clergy have historically been chaplains to the powerful influencers. Clergy who are new and move into these communities seeking significant change and control will meet great resistance
- New models for oversight are being utilized in the Diocese of Texas; bi-vocational priests, lay vicars, part-time retired clergy
- Staff: sometimes full time, often part-time clergy, part-time secretarial help, sometimes one other part-time person (10 hours a week) like a musician, youth minister or Director of RE

STRUCTURE

Refer to Illustration A

FAMILY

Size Congregation

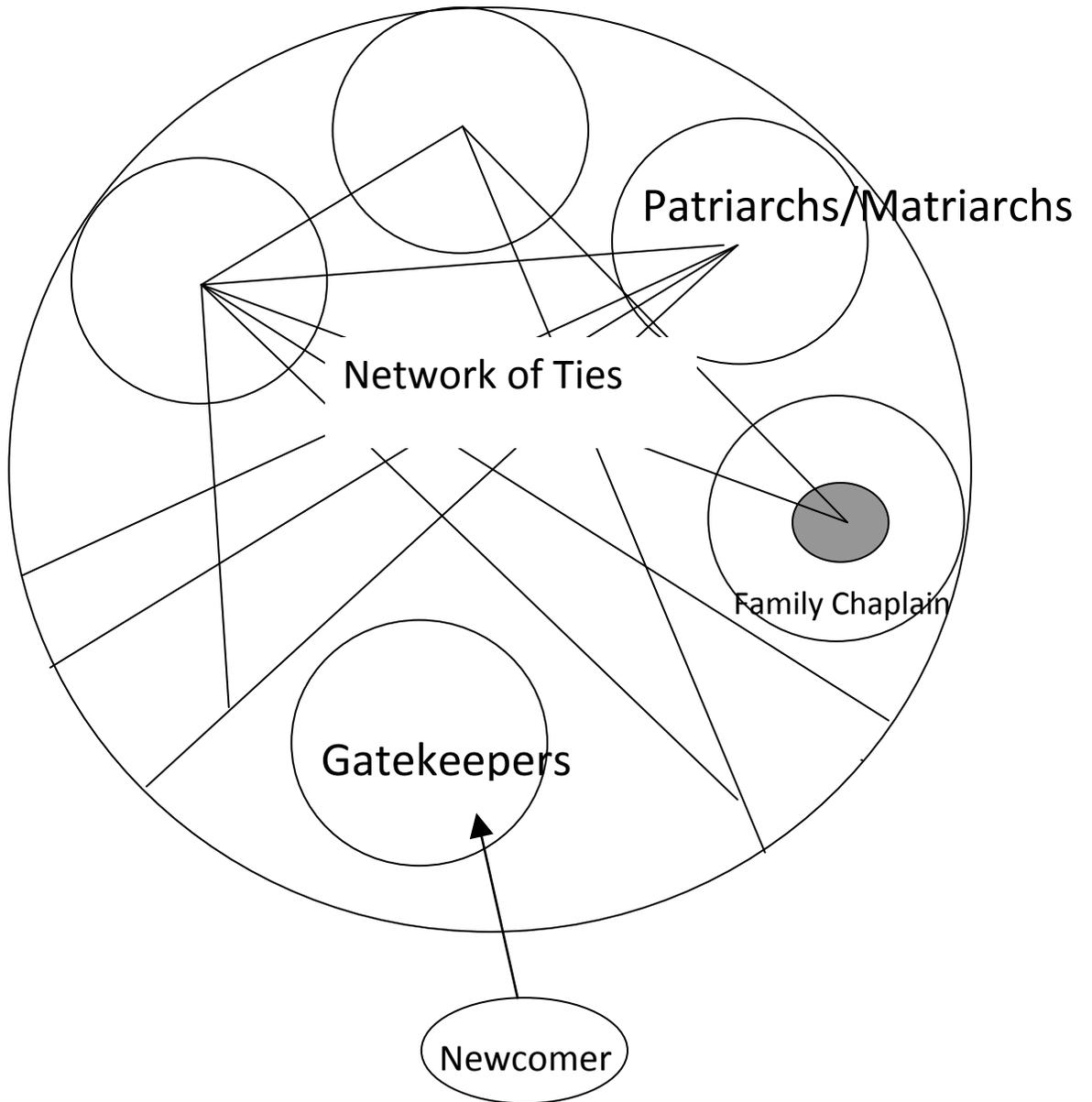


ILLUSTRATION A

PASTORAL

- **76-150** average Sunday attendance
- Rural, small town, sometimes older inner-city congregations
- Two to three cells: membership, fellowship, leadership
- Circles revolve around a central vicar/rector
- Entire congregation very dependent of vicar/rector for direction, inspiration, pastoral care
- Growth potential: difficult to fair

WHY PEOPLE JOIN

- “They like the rector”
- Joining appears to be simple process without having to get by “gatekeepers”
- Strong feeling of acceptance because of warm welcome
- They feel the church is large enough that there is a place for them and a place to serve, yet it still feels small enough to get to know everybody. It’s “not too big”.

GAINING ACCEPTANCE

- The rector/vicar often takes the responsibility to invite a newcomer into a ministry and the life of the congregation and works them through the simple maze of assimilation.
- Despite being greeted warmly, it may be hard to work into the fellowship circle and the inner circle of leadership
- “Screening” will be a subtle way that the members match the congregation’s norms and values with those of prospective members

VESTRY/BISHOP’S COMMITTEE AND STEWARDSHIP

- Size: 6-9 members
- Bishop’s Committee/Vestry members are often still the “doers” of ministry, but there are more ad hoc and on-going small committees than in family size congregations
- Bishop’s Committee/Vestry members feel the responsibility of being the leaders for the church
- Stewardship always a challenge. Often informal campaigns. Predominant emphasis on salaries and building maintenance. There is a need for program money but there is often very little of it.
- Need for intentional visioning/planning/goals but a natural resistance to it because of simple, low key and flexible organization

LEADERSHIP

- Vicar/Rector at center and is depended on too heavily for new member incorporation, pastoring, leading, inspiring, decision-making. These demands create an environment for easy burn out
- The effectiveness depends on good communication and the healthy relationship of the priest and the key leaders
- Staff: full time vicar/rector, full time secretary, two part-time staff such as music, youth, DRE (in largest of this size church)

STRUCTURE: Refer to Illustration B

MINISTRY MATTERS

PASTORAL

Size Congregation

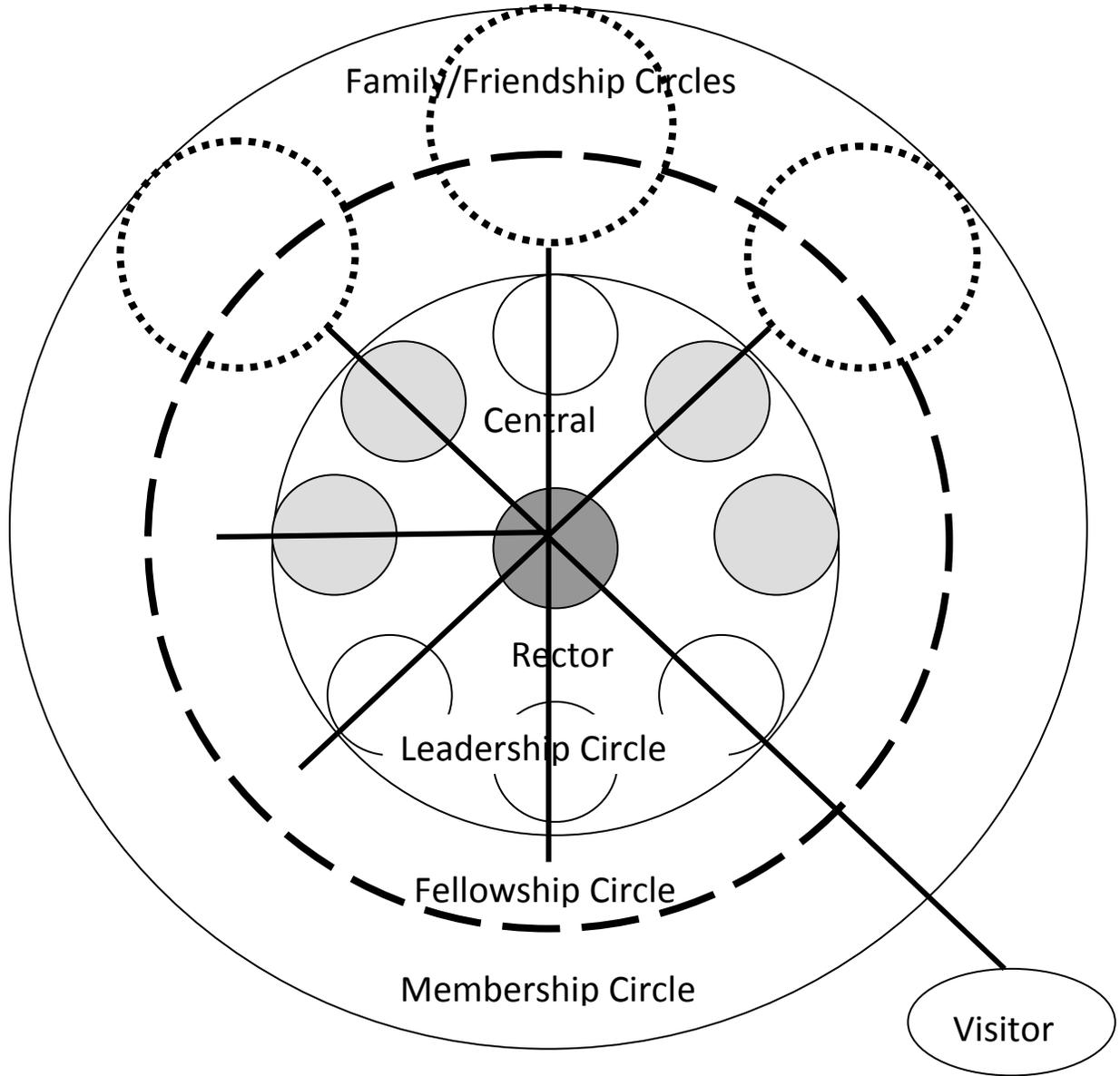


ILLUSTRATION B

TRANSITIONAL

- **151-225** average Sunday attendance
- Most stressful size for clergy and leaders
- Doesn't stay in this size category for long
- Often demonstrates the characteristics of a smaller congregation, yet yearns to be larger
- Can be a hybrid of pastoral and program sizes, or declining program size
- Organizationally challenged to be fluid and adaptable
- Growth potential: Fair to good for growth OR shrinkage

WHY PEOPLE JOIN

- Energy in this fluid size
- Large enough to provide some programs and a diversity of worship services, ministries
- Likelihood that this size church will make intentional welcoming and assimilating efforts

GAINING ACCEPTANCE

- The membership is quite aware of its efforts to grow and will probably make persons feel welcomed quickly, not much "screening"
- Newcomers will be invited into individual ministries through the respective heads of ministries
- Acceptance must come primarily through activity in ministries outside of the worship service because the size limits the ability of a person to get to know others in the context of worship

VESTRY AND STEWARDSHIP

- Size: 9-12 members
- Vestry often overworked because the church isn't adequately empowering other committees/groups with significant responsibilities
- Vestry very stressed and feeling in a fragile place because its property, facilities and resources are often inadequate to support the current program, much less future plans
- Vestry often feels a loss of control of the ministries. They notice that they don't know everything happening at church
- Pushed to have greater accountability, strategic planning, more organized oversight than smaller congregations
- Financial demands call for excellent, organized stewardship campaigns that may be unfamiliar to the leaders

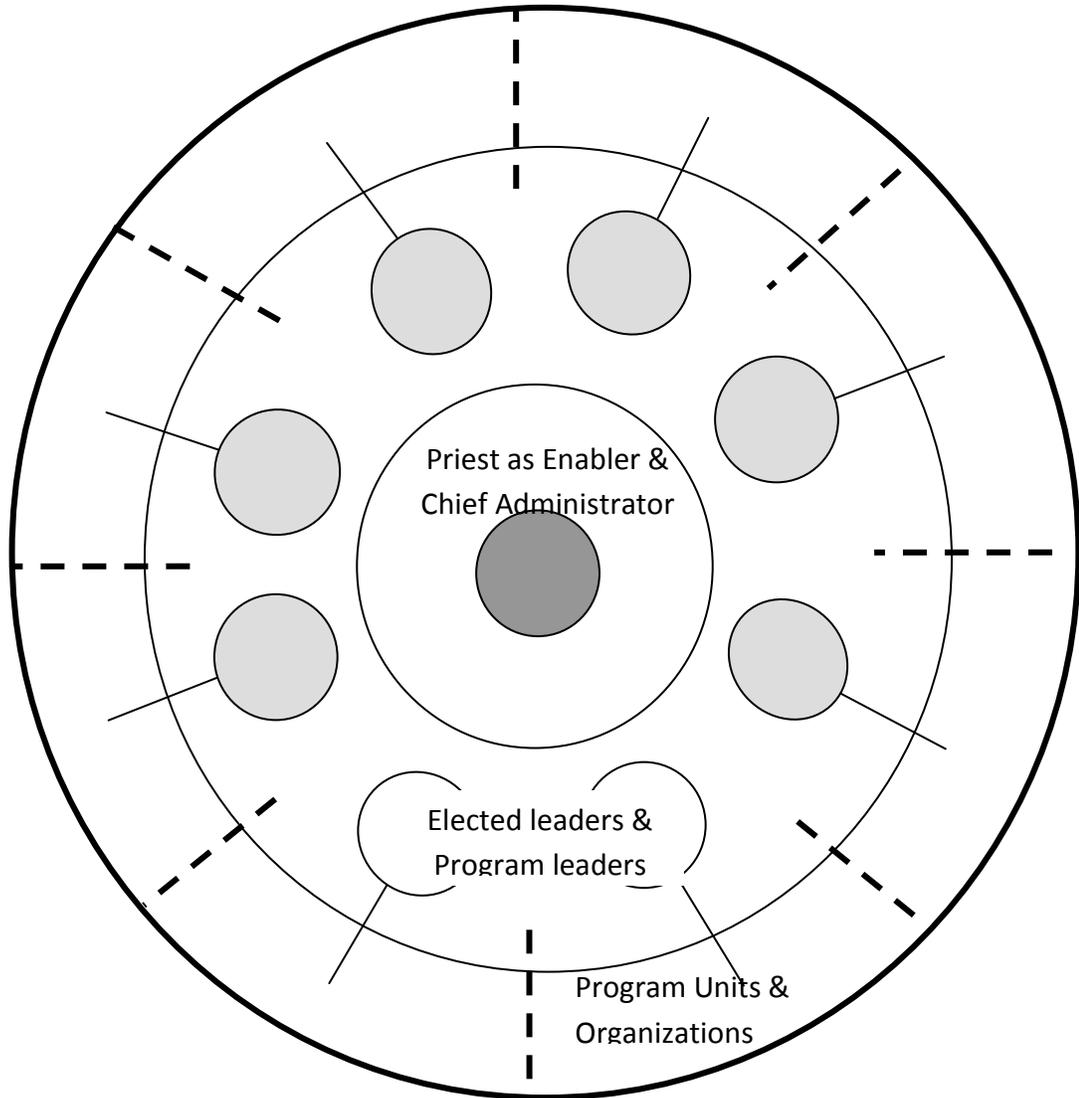
LEADERSHIP

- Clergy needs to be confident/able to manage change because of the fluid nature of this size
- High burn out for clergy and laity because of the stressful nature of this size
- Multi-levels of leadership necessary
- Leadership must take responsibility to build ways to communicate with each other and the congregations that is frequent and repetitive
- Usually has a number of overworked part-time staff, with some positions needing to be moved to full time but the church is challenged to find the financial resources to do it
- Staff: Fulltime clergy, secretary. Possibly 1 full time and 2-3 part-time persons (DRE, Youth Director, Lay Ministry Coordinator, Musician, sexton, bookkeeper)

STRUCTURE: Refer to Illustration C

TRANSITIONAL & PROGRAM

Size Congregation



This illustration favors Program size churches

A Transitional size congregation is usually less structured, but strives to get a handle around the manner it needs to be organized to be fluid, yet growing

Illustration C

PROGRAM

- **226-450** average Sunday attendance
- Cities, growing suburban areas
- Great delegation and empowerment of the laity for ministry
- Life of the congregation centers around programs, ministries and multiple worship services (2-3 on Sunday, often 1 or 2 midweek)
- Numerous opportunities for personal engagement in ministries
- Growth potential: good to very good

WHY PEOPLE JOIN

- A large variety in ministries, programs, worship service times and styles
- An emphasis on quality
- Usually high visibility and a good reputation in the community
- A highly organized assimilation process which starts with a warm welcome

GAINING ACCEPTANCE

- Mostly welcoming, accepting atmosphere with almost non-existent “gate keeping”
- Organized process for assimilation is used and is sometimes required of newcomers for becoming a member of the congregation
- Assimilation into small groups necessary to get persons quickly engaged in the life of the congregation and to make friends and build relationships

VESTRY AND STEWARDSHIP

- Size: 12-15 members
- Primary concerns are stewardship, vision casting, planning for the future, staff support, buildings, grounds, financial support of ministries
- Vestry empowers committees and other groups to plan ministries
- Ministry oversight done through vestry liaisons and ministry reports
- Vestry plays role in raising up, identifying and encouraging new leaders
- Vestry works hard to communicate actions, direction with congregation
- Potential for excellent stewardship is high. Large financial demands of this size requires outstanding leadership in this area.

LEADERSHIP

- Rector and vestry work together to lead the church forward in a purposeful way
- Numerous leaders at many levels work with the staff to run programs and ministries
- Rector has large responsibilities for management and oversight of a multi-person staff and this necessitates the training and empowerment of others to do the bulk of pastoral care
- Staff: Full time - 1-2* clergy, 1-2* secretaries, Lay Ministry Coordinator*, DRE*, Youth Director*, Music Director*, sexton or cleaning service (*sometimes these positions are part-time). Part time - bookkeepers, nursery workers and other necessary persons. Some work is out-sourced. The staff is as large as the church can afford

STRUCTURE: Refer to Illustration C

RESOURCE

- **451+** average Sunday attendance
- Usually large cities, growing suburban areas
- Large, complex and diverse congregations
- Hallmark of excellence
- A church of multiple small to large congregations
- Growth potential: excellent

WHY PEOPLE JOIN

- The “cafeteria” approach to numerous opportunities meeting a variety of needs
- People appreciate the high standards for excellence in offerings
- “Big is Successful” in America
- Opportunity to gather in small groups and celebrate in very large groups
- People can remain anonymous and be confident that others will get the job done
- The energy and momentum in a large congregation

GAINING ACCEPTANCE

- Highly organized welcome and assimilation process assures people’s engagement in the life of the congregation quickly and provides opportunities for establishing relationships

VESTRY AND STEWARDSHIP

- Size: 12-18 members
- Vestry work is corporate in nature, often like board of directors but charged with the uniqueness of being the leaders of a church
- All program, ministry staffing in the hands of others
- Often unaware of the full scope of the ministries of the church
- Have written communication links with ministry heads/staff with an impersonal reporting function
- Connection with staff is for financial support and accountability
- Responsibilities fall mainly into financial, facility, reporting, vision casting, long range planning modes
- Vestries work closely with the rector for spiritual direction and oversight
- Stewardship **MUST** be done professionally with excellence

LEADERSHIP

- Rectors have demonstrated different gifts and leadership styles, but these congregations encourage complementary leadership to work with the rector to have strength at the top
- Strong, talented staffs are empowered to develop ministries, raise and train leaders
- Vestry members are capable, respected and identified leaders in the congregation
- Staff: Full time – 2-5 clergy, numerous people overseeing all aspects of administration, ministries, facility supervision, etc.

STRUCTURE: Refer to Illustration D

RESOURCE
Size Congregation

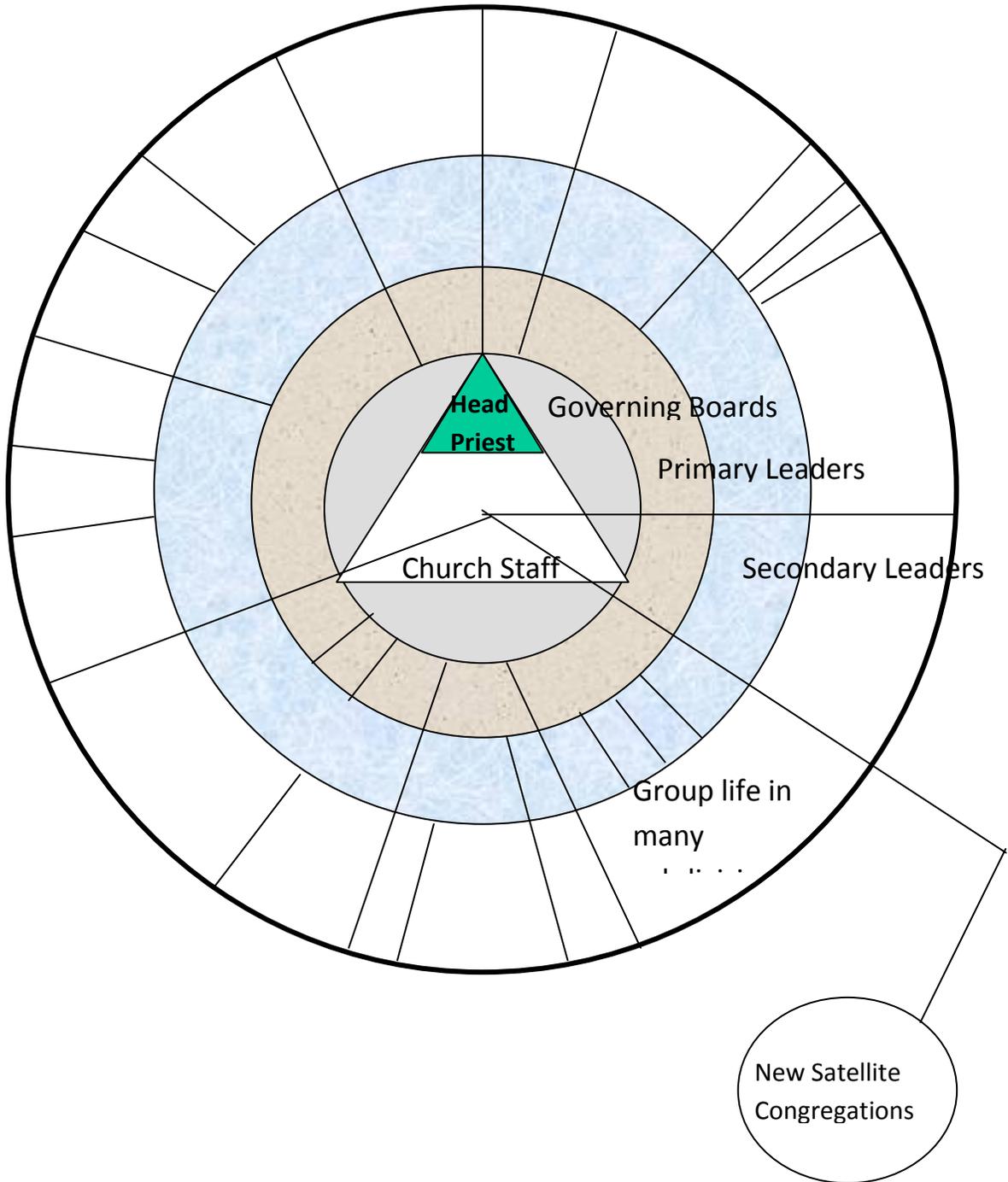


Illustration D

12 Marks of Healthy Church Behavior

1. Worships: Designs and carries out in a thoughtful and excellent fashion worship that is responsive to the individual nature of the congregation. The congregation understands the power of the Holy Eucharist to renew the spirit. Worship is vibrant and alive and touches the worshipper. Liturgy is well planned and executed.

2. Knows Itself and Moves Forward: Defines itself by its sense of values, mission (purpose) and vision with resulting plans for the congregation. The culture is one of expectation of constant movement and change, seeking God's will for its future. This awareness is grounded in theological definition and understanding.

3. Invites, Incorporates: Invites, displays hospitality and works toward inclusion of newcomers and members into active participation in congregational life with an emphasis on relationship formation.

4. Disciples: Takes seriously the formation of disciples, grounded in the Baptismal Covenant with emphasis on spiritual formation, biblical education and prayer.

5. Lives as Stewards: Promotes good stewardship of parishioner's time, spiritual gifts, talents and money.

6. Empowers: Fosters a culture of empowering ministry utilizing knowledge of persons' spiritual gifts and passions for service.

7. Demonstrates Expectation and Accountability: Lays out expectations and respective accountability for everyone who undertakes ministry.

8. Reaches Out: Focuses significant ministry outside the congregation to the community and beyond.

9. Fosters a Learning Culture for Leaders: Understands that leaders in Christian community have a distinctive call, that they seek God's guidance, are willing to risk, lead change well and learn from experience. Leaders are trained and expected to mentor future leaders. Lay leaders foster a healthy relationship with their clergy.

10. Communicates: Generates effective communications inside the church and outside to the community.

11. Manages Conflict: Conflicted situations are managed with practices/processes that foster and reflect a theology of reconciliation.

12. Understands the Need to Be Connected to the Greater Church: Demonstrates connectedness and support for the wider church.

Authors: Mary MacGregor and Reb Scarborough, 2004 **References:** Peter Steinke; The Evangelism, Church Growth, Worship and Mission Agency of the Presbyterian Church of Canada

DIOCESE OF TEXAS
“HEALTHY CHURCH” QUICK SURVEY



This survey is designed to get feedback on the overall health of a given church. It may be completed by whole congregation or a select group. On-line version is available. Select the rating that best reflects your experience. A larger program has been developed by the Diocese to support the growth of healthy churches, entitled, _____ and is available through the Diocesan office.

Characteristic	Disagree	Agree	Score
Worships: Encourages sacred worship of God in a variety of ways, liturgy that is well planned and executed	1 2 3 4 5 6 7 8 9 10		
Vision/Mission: Articulates and lives into its sense of values, mission (purpose), vision	1 2 3 4 5 6 7 8 9 10		
Invites, Incorporates: Invites, displays hospitality and works toward inclusion of persons into congregational life, developing and nurturing relationships	1 2 3 4 5 6 7 8 9 10		
Disciples: Takes seriously the formation of disciples, grounded in the Baptismal Covenant with emphasis on spiritual formation, biblical education and prayer	1 2 3 4 5 6 7 8 9 10		
Lives as Stewards: Promotes good stewardship of parishioner’s time, spiritual gifts and money	1 2 3 4 5 6 7 8 9 10		
Empowers: Fosters a culture of empowering ministry and Leadership development	1 2 3 4 5 6 7 8 9 10		
Demonstrates Expectation/Accountability: Clearly conveys expectations and has systems for accountability for persons who undertake ministry	1 2 3 4 5 6 7 8 9 10		
Reaches Out: Focuses significant ministry outward to the community and beyond	1 2 3 4 5 6 7 8 9 10		

<p>Fosters Learning Culture for Leaders: Supportive culture for leaders to take risks, encourage change when needed, and learn from experience. Lay leaders foster healthy relationships with rector/clergy</p>	<p>1 2 3 4 5 6 7 8 9 10</p>	
<p>Communicates: Generates effective communications inside the church and outside to the community</p>	<p>1 2 3 4 5 6 7 8 9 10</p>	
<p>Manages Conflict: Manages conflicted situations with practices/processes that foster reconciliation</p>	<p>1 2 3 4 5 6 7 8 9 10</p>	
<p>One Church: Demonstrates connectedness to the wider church</p>	<p>1 2 3 4 5 6 7 8 9 10</p>	
<p>Total</p>		