

Mutual Ministry Review: Celebrate Success-Resolve Challenges

This document was developed by congregational consultants of the Diocese of Washington, based on original work by The Episcopal Church Foundation, Ms. Sally Bucklee, and the Office of Congregational Development of the National Episcopal Church. There is no single way to do mutual ministry review. Five guides to mutual ministry that have been used by our diocesan consultants follow this overview. Further resources information about mutual ministry can be obtained by contacting the Canon to the Ordinary Paul Cooney at (202) 537-6537.

What is Mutual Ministry Review, and why should our parish do it? Mutual Ministry Review is a way for every parish to ask, "How are we doing?" It is a time to celebrate what has been done well and to understand what might be done better. As Christian people we must always ask: "What is God calling us to do and to accomplish here in this place?" And then, "How can we best practice this ministry?"

Ministry is the work of the whole people of God, not just of the ordained clergy. Therefore, Mutual Ministry Review is meant to help the entire parish better accomplish God's mission. What is being reviewed is the ministry of laity and clergy working together in the daily life of the community for the glory of God.

Mutual Ministry Review is intended to nurture environments where responsibilities are discussed and reviewed regularly and comfortably. As a result, communities and individuals will understand what is expected of them. Roles will be clarified, and time and energy centered on what is important for the building up of the Body of Christ.

Participants are encouraged to remember that the intent of the Mutual Ministry Review is to improve effective ministry. The focus will be on means of improvement rather than on reasons why something was not done. Within the pastoral context of the review process, the emphasis is on **celebrating the successes and resolving the challenges**. This is sound, healthy stewardship.

Planning A Mutual Ministry Review

I. Deciding where and when to begin

Many believe that the most critical influence on congregational health and vitality is the Vestry/Rector relationship, and that is where Mutual Ministry Review usually begins. Mutual Ministry Reviews work best when they are part of a **regularly scheduled** process of clarifying expectations, responsibilities, and effectiveness. When discussion and feedback are expected as a normal part of life together, the anxiety about such a process is greatly reduced. At all times, prayer and support for everyone involved in the Review is integral to the process. **Avoiding defensiveness, encouraging participation, and setting clear goals** for turning challenges into successes are key factors.

Comprehensive reviews are not helpful when major conflicts are present. Using evaluation as a weapon is never acceptable. When regular assessments are a part of a congregation and rector's life together, strengths and challenges can be identified early and easily. The time to

begin a review process is NOT when the relationship is already in trouble. If major tension has developed, conflict resolution or problem solving is called for, not ministry review.

II. Identifying what you want to achieve

A successful Mutual Ministry Review helps both rector and vestry feel affirmed, supported, and encouraged in their ministry and valued as individuals whose efforts and accomplishments are recognized and appreciated. Both personal and organizational problems need to be tactfully but clearly identified and mutually explored to find ways to alleviate the problems.

The vestry and rector should exchange ideas on priorities for continuing personal growth and development in the rector's skills, the vestry's effectiveness, and their mutual effectiveness as a vestry/rector team. A successful review will leave all parties uplifted and energized by a sense of God's presence and action in the process.

III. Clarifying the difference between roles and responsibilities

Although Ministry Review evaluates the performance of priest and vestry, the Rector is the one who is most often reviewed for both responsibilities and roles. Therefore it is important for everyone to understand each and the distinction between the two.

A Rector is also a Priest. “Rector” implies responsibilities and tasks, while “Priest” implies role. Rectoring means doing--planning services, teaching youth, supervising staff. Priesting means Being—one who is a bearer of holy things, prophetic, open, and loving. Rectoring calls up words like professionalism, competence, and performance. Priesting calls up spirituality, faith, and mystery.

Responsibilities:

Preaching
Pastoring
Administering

Role:

Being a spiritual person
Being a sacramental person
Being authentic

Responsibilities: Rectors provide administrative authority, organizational leadership, pastoral care, and guidance toward growth. They are the organization's key for resources, action, and reaction. Their primary vocation is commitment to the organization. The effectiveness of the congregation's total ministry depends to a large extent on what the lay people expect of their rector, how they share the ministry, and how they contribute toward it.

Role: Priests are central by what they symbolize to the congregation, and by the way they represent the congregation to the wider community. They are central and symbolic in the way they express personal faith, care, and commitment, especially when that faith and commitment are visible to other people.

Guidelines for Mutual Ministry Review

1. **Remember you are not in this process alone.** Christ, who is the true head of the church, is our constant companion in the journey. When we take seriously our call as Christians to share in a common ministry, we agree to be open to the leading of God's

Spirit. The hard job of evaluation is part of that commitment. As you approach this task, be challenged by the words of Paul to the Corinthians, “Keep alert, stand firm in your faith, be courageous, be strong. Let all that you do be done in love.”

2. **Set goals that are limited, specific, measurable, and achievable.** Keep it simple! The more complex an evaluation process becomes, the more likely participation in it will be limited, the process will not be completed, or it will result in a large, detailed report never to be read or heard from again.
3. **Determine the best time to schedule reviews.** Special reviews can be helpful during a priest's first year of service; quarterly conversations with a six-month and one-year check-up with renegotiation can assist the new rector and vestry to keep on track with mutual expectations and goals. A more comprehensive review every four to five years can be valuable.

Note: Compensation reviews for clergy should not be held in conjunction with mutual ministry reviews. Ministry reviews in the fall and compensation reviews in the spring (or vice versa) can avoid this tension.
4. **A comprehensive review is most helpful when the rector requests it.** Planning the process in such a way that both clergy and vestry contribute to the design leads to ownership by all.
5. **Develop a design that fits your specific parish.** Congregation (size, history, finances, location, theological perspective, etc.) and rector (years of experience, health, gifts, etc.) are so varied, no single plan for review may fit well. A consultant can be helpful in designing and assisting in an appropriate review process.
6. **Be clear from the outset what will happen as a result of this review.** Who will see the findings? How will a report be made to the congregation and others? If changes in job descriptions, the mission statement, or goals are to be made, who will make and approve them? How will those changes be reported and evaluated?
7. **Provide a system for monitoring decisions.** Timelines, measurable goals, strategies and "temperature taking" sessions can all help sustain the learning from the review and assure that the agreed upon changes do occur and continue.
8. **Focus on positives as well as negatives.** Look at strengths and opportunities as well as weaknesses and problems. Stay away from comparisons and focus on individual potential and development. Meanwhile, steer a careful path between two extremes: the “shower of praise” that says only that "everything is going fine, you're wonderful"; and the “shower of complaints” that may hide serious issues under a mass of non-issues.

Helpful Background Information:

Survey results from healthy congregations

In 1995 as part of their wellness initiative, the Episcopal Church Foundation and The Cornerstone Project commissioned consultant Tom Ehrich to interview the Rectors/Vicars and

Wardens of 25 Episcopal congregations, ranging in size from 70 to over 3,000 members—all having been defined as reasonably healthy congregations. The following compilations of markers of healthy vestry/rector relationships and new ways to work together are based on the work of Tom Ehrich.

I. Markers of a Healthy Vestry/Rector Relationship

Interviews of Rectors/Vicars and Wardens of vigorous congregations revealed the following characteristics of healthy relationships:

- **The personal health of the individuals** in the relationship is the primary contributor to the health of the relationship. Much less important are factors like organizational models and decision-making norms. Signs of health include personal maturity, the ability to function openly in an ambiguous, stressful and often conflictual environment; spiritual vitality; and emotional stability. Because a consensus-based system is vulnerable to unhealthy personalities, attention is being paid to who gets nominated to the Vestry, and to the emotional and physical health of Rectors.
- Vestry members **take responsibility** for the life of the group. The need for norms and "self-policing" is recognized; unhealthy behavior is identified and dealt with by the vestry as a whole.
- Clergy **understand boundaries** and the importance of self-differentiation.
- The Rector and Senior Warden are **clear about their respective roles** and meet often enough to develop trust and personal support.
- The Rector is expected to be **the leader, though not a dictator**. S/he is expected to have an agenda, but to encourage the Vestry to reshape, refine, and even reject that agenda. Patience with the slower pace of shared leadership is critical.
- The **Vestry feels competent and valued** and accepts the higher degree of accountability that goes along with collaboration. The former authoritarian model often caused Vestries to feel incompetent, unnecessary, and resentful.
- A high degree of **personal maturity and trust** is present. Confrontation is direct, respectful and centered in role and function, rather than passive-aggressive and centered in personality. All understand triangulation and work to eliminate it in the congregation.
- Decision-making is an **open process**. In healthy systems, clergy keep Vestry members informed; lay the ground for discussions, rather than throwing ideas onto the table without advance notice; and avoid any appearance that decisions have already been made by a secretive core group. In very large congregations, executive committees serve to focus the Vestry's time and to fashion proposals for Vestry action, but do not make decisions.
- Clergy and lay leaders are **team players and consensus builders**, rather than "lone rangers," legalists, or people with a specific agenda.

- Vestry structures are considered flexible, needing to be "**reinvented**" regularly.
- The Vestry's **spiritual agenda** is clear. Rector and Vestry pray, worship regularly, and take stewardship seriously. The tithe is frequently acknowledged as normative.
- Leaders pay attention to the **quality** of Vestry meetings. Some have dinner first to promote relaxed fellowship. Several are reconsidering meeting space: moving away from the long tables, which reflect a board-of-directors style and moving toward chairs in a circle with no table.

II. New ways to work together

Surveys indicate that the most satisfied clergy are those who have "significant clarity about their roles and about the roles of key lay readers." However, those roles are in the process of being changed and redefined as are the ways that clergy and lay leaders function together. In many parishes the Rector/Vestry system is changing away from an authoritarian, "Father knows best" system to a more collaborative, consensus-based relationship. While both laity and clergy welcome this, the roles and expectations of each are still being defined.

Some new ways that clergy and lay leaders are working together include the following:

- **Delegation of duties:** Although most congregations continue to observe the traditional delegation of duties, with clergy handling pastoral care, worship, and program and lay leaders handling finances, property, and fund-raising, these distinctions are blurring and, in fact, are considered unhelpful by some. There is a recognition that the dichotomy between secular and sacred needs to be overcome. The emerging trend seems to be that clergy and lay leaders function best where they feel most capable.
- **Vestry action:** Vestries are learning to deal with stresses in the parish directly, rather than by passing those stresses on to the Rector to handle alone. In general, lay and clerical leaders reject the former parent-child system and are seeking a system where "the Rector enables the Vestry to feel competent and where the Rector can be a "non-anxious presence."
- Most Vestries have moved away from parliamentary procedure grounded in motions, votes, and majority rule in favor of **a consensus model**, in which leaders keep discussing and refining until they arrive at a decision that everyone can live with. Consensual decision-making requires a group process marked by openness, a commitment to say it all at the table in front of everyone, and personal maturity. This emerging system seems less open to single-agenda people, leaders who stay silent and then "lob grenades," and leaders who wait for the parking lot and grapevine.

Vestry members have, in fact, had to learn how to confront negative and disruptive behavior and how to prevent triangulation. Consensual decision-making requires the Rector to be flexible, patient, a good listener, and skilled in group process. Vestry members need the same skills and attributes.

- **Vestry training** is stressed more. **New members overlap** with retiring Vestry members for at least a few sessions to promote continuity and avoid sudden shifts of focus. All

members are clear about explanations of Vestry duties, parish by-laws, Vestry policies and norms, Anglican polity and ethos, and understanding financial statements. Many vestries go on at least one retreat a year; several Vestries have two: one focused on team building and the other on goal-setting or other business.

- Vestry **nominating processes are changing**. Vestries and Nominating Committees are discouraging special-agenda candidates from standing for election and seeking out persons with "broad vision" rather than those representing a particular constituency or cause. Some congregations are experimenting with new ways to handle the nominating process. Most have outgoing members nominate two candidates for every slot to be filled. Some congregations are debating a slate system, in which only six are nominated for six slots because those who lose an election feel humiliated and are unwilling to run again or may even leave the parish. There is great concern to avoid bringing onto the Vestry unhealthy personalities who might disrupt a collaborative system, and yet, it is imperative to assure diversity on the Vestry and in other leadership roles.
- **Clergy wellness** is valued; a strong support system needs to be in place. Many congregations value Clergy **sabbaticals**.
- Training for both clergy and laity in **conflict management** and in **power**, including how to build consensus, how to let go, how to maintain decision-making processes that are inclusive, open, consensual and fair. There is a growing awareness that disempowered people take up a lot of airtime in meetings.
- The **use of outside consultants**, to provide fresh perspectives, to undo minor logjams, to encourage effective communications, and to guide systems through major crises.
- **Accountability** is an issue that is far from being resolved. Vestry members tend to see their bottom-line role as serving the people who elected them, and doing so at least partly by holding clergy accountable. Clergy aren't in a clear position to hold volunteer leaders accountable. Clergy tend to see lay leaders not as employers to be pleased or employees to be disciplined, but as partners in ministry. Efforts are moving toward candid dialogue, occasional confrontations, sorting out together what the real issue is and how to resolve it together.
- Vestries are rethinking how they **structure meetings**. Agendas are being changed to put high-priority items up front, when energy is highest, rather than the traditional model of minutes and treasurer's report first. Putting financial reports lower on the agenda prevents their controlling the meeting. Sometimes, they even omit them in order to draw attention to other matters. Several Vestries start with an extended spiritual focus, either in small sharing groups or in a general time of study and prayer.

There is no single way to approach mutual ministry. Five different guides follow.

Mutual Ministry Guide 1

Edited text of a presentation by Harvey Chaplin (703-356-7196) to the Diocese of Washington's Warden's Conference at the Washington Cathedral.

MUTUAL MINISTRY REVIEW

An evolution from

“RECTOR EVALUATION”

Rector Evaluation has been a challenge for Vestries and Rectors for a long time. It is something that nearly everybody recognizes to be important – everyone needs feedback, Rectors no less than others – but hardly anybody approaches a Rector Evaluation without trepidation. There is so much trepidation, in fact, that in most parishes it is done infrequently, or not at all. When it is done, the results are very often unsatisfying for all concerned and the participants do not feel much incentive to do it again soon.

Of course, that is not always the case. A few parishes have evolved their own approach to Rector Evaluation which works well and leaves Rector and Vestry feeling affirmed in their overall ministries while feeling enlightened about troublesome areas – and feeling energized and empowered to work together toward solutions.

But the exceptions are rare. Most Vestries and most Rectors still look upon the evaluation process as an awkward and painful one which – if it becomes too awkward and painful – has potential to do more harm than good.

Problems in Rector Evaluation

The first thing that needs to be acknowledged as a problem is the term “Rector Evaluation” itself. In the secular world, we long ago stopped talking about “employee evaluation” and talk instead about “performance review”. To simply say “Ministry Review” instead of “Rector Evaluation” is in itself a small step in the right direction. We do not evaluate people – we evaluation people's behavior. Only God can evaluate a person.

The following figure outlines four of the most common problems contributing to the awkwardness and pain of Rector Evaluations.

COMMON PROBLEMS IN RECTOR EVALUATION

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|--|---|
| <ul style="list-style-type: none"> • FAILURE TO AFFIRM | <ul style="list-style-type: none"> • TOO MANY ISSUES

 Uncertain Validity
 Uncertain Priority |
| <ul style="list-style-type: none"> • ONE-WAY STREET
 Feedback
 Responsibility to Resolve | <ul style="list-style-type: none"> • MANY-ON-ONE SESSION
 Group Dynamics
 A Rock and a Hard Place |

Failure to Affirm – Americans tend to be problem solvers, and they tend to approach a Rector Evaluation session by getting right to the problems. Taking time to acknowledge and affirm the things which are going well is crucially important. It puts the problems in a more realistic perspective, and enables the Rector to be a better listener and helps him or her to avoid being defensive.

One-Way Street - Vestries often approach Rector Evaluation purely as a task of providing feedback to the Rector and overlook the importance of receiving feedback from the Rector. They also often tend to frame their feedback in terms of problems which are “The Rector’s Problems” which are his or her responsibility to resolve, overlooking the powerful advantages which can accrue from framing problems when possible as “Our Problems” which we can mutually work to resolve.

Too Many Issues – Episcopalians, more than members of most other denominations, hold a very wide range of views about what is important in a parish, what a Rector is, what a Rector is supposed to do, and so on. Consequently, even in a very healthy parish with a very popular Rector, practically everybody has one or more complaints. If the Vestry brings too many of these complaints into the Evaluation process – and especially if they don’t screen them to drop out those which are issues for only a very few people and sort them to identify which are the most important ones – it can be confusing and demoralizing to the Rector and does not provide the kind of feedback which he or she can use effectively. It is essential that both the Vestry and the Rector restrict their feedback to a small number of the most important targets for improvements.

These three factors are equally problems in the secular world, when a supervisor sits down with an employee for a performance review. It is essential that the employee feel **affirmed**, as a person and a valuable member of the organization, in order to be able to hear and respond constructively to the supervisor’s agenda for improvement. It is important that the supervisor establish a **two-way street** atmosphere, being open to the employee’s feedback and ideas. It is essential that the supervisor address only a **small number of issues** as targets for improvement during the coming year.

The fourth factor, however, the **many-on-one session**, is a rarity in the secular world. That is indeed fortunate, because unless the performance review committee is composed entirely of mature, self-disciplined people who are skilled in the art of giving constructive feedback, the

many-on-one session is very much prone to disaster. That is so because of the group dynamics which tend to emerge in such a session and because of a peculiar disadvantage in which the person being reviewed tends to find himself or herself – “between a rock and a hard place”.

Following is a fictional roster of a Rector Evaluation Committee which may give some hint regarding the sorts of group dynamics which can arise:

MAKEUP OF A FICTIONAL RECTOR EVALUATION COMMITTEE

Ida - enjoys giving hurtful criticisms

Mary - is a defender – she leaps to the Rector’s defense against every criticism. (Others get so annoyed with Mary that they forget to tell the Rector how much they appreciate his/her excellent performance in most areas.)

Alice - dismisses most complaints as indications of lack of Christian commitment.

John - provides authoritative proclamations of how “most people” feel about any issue

George- feels lay persons should not presume to advise ordained priests about ministry.

Albert - is a one-issue man with a mission: Return the 1928 Prayer Books to the pews.

Susan, Harry, Joe - intensely dislike public criticism of anyone, and suffer in silence.

The probability that an evaluation session between the Rector and this committee will end in feelings of mutual affirmation, enlightenment, motivation and empowerment is not very high. (Yet this group, working without the Rector present, might be quite capable of reaching a consensus on what are the few most important improvements in parish functioning which the Rector and Vestry working together should be able to bring about.)

Fortunately, no one Vestry or Committee will contain all of these characters, but it only takes a few of them to make it extremely difficult to hold a really constructive many-on-one Rector Evaluation session. And the tensions inherent in a many-on-one Rector Evaluation session can often bring out the worst sides of whatever personalities are present.

Even if you somehow miraculously manage to maintain healthy group dynamics with everyone doing their best to participate constructively, the Rector will repeatedly find himself or herself “between a rock and a hard place”.

A ROCK AND A HARD PLACE IN A MANY-ON-ONE SESSION

Whenever the Rector receives an unfair or inaccurate criticism, he/she can:

**1. Deny the criticism – thereby seeming defensive in the eyes of some.
(That’s a loser.)**

or

2. Play “good listener” – give it the old “I hear what you’re saying and I understand how you feel” treatment – thereby validating the criticism in the eyes of many. (That’s a loser, too.)

The many-on-one session can be a lose-lose situation for the Rector, even if the group dynamics do not derail the session.

The Birth of a Better Process

The Mutual Ministry Review process now being employed in an increasing number of parishes in the Diocese of Washington got its start in 1988 when the Wardens of one parish sought Bishop Haines’ counsel on what they perceived to be a dangerous problem. Their parish was approaching a Rector Evaluation at a time when the Vestry was polarized between one faction insisting on some significant changes in ministry style, and a second faction which perceived the pressure for change as a “get the Rector” movement. Moreover, though the Rector was highly skilled in most areas, nondefensive listening was not one of his skills. With Bishop Haines’ help, the following strategy was developed:

1. The evaluation should be a two-way exchange of written feedback between Vestry and Rector, followed by negotiation of an agreement responsive to as much of the feedback as possible.
2. The Vestry’s feedback for the Rector should be developed without the Rector present, in order to permit frank, uninhibited discussion leading to a feedback message representative of the whole Vestry, free of the mixed messages from different factions and individuals.
3. There should be insistence that both the Vestry’s and the Rector’s feedback messages include realistic affirmation as well as proposals for change – not more than five.
4. The negotiation of a final agreement (subject to approval of the full Vestry) should be between Wardens and Rector, avoiding the hazards of a many-on-one session.

This strategy was followed with near-miraculous results. The Vestry’s polarization vanished. The Rector’s suspicions of change advocates vanished. Significant change efforts were agreed to by both Rector and Vestry, and were implemented during the following months with considerable success. The ability of Rector and Vestry to work collaboratively was very much improved. The morale of all involved, and the parish at large, was greatly enhanced.

From this beginning has evolved a formal six-step process, which has been highly successful and is being employed in increasing numbers of parishes. It is outlined in the following two figures.

MUTUAL MINISTRY REVIEW

Participants: Rector
Vestry
Consultant

Target Outcomes: Rector/Vestry mutual affirmation.

Rector Vestry exchange of valid feedback.

Mutual selection of a few targets for improvement efforts.

Strengthened Rector/Vestry collaborative problem-solving relationship.

MUTUAL MINISTRY REVIEW PROCESS

1	2		4		
Vestry	Vestry		Vestry	5	6
1	2	Vestry & Rector	4	Wardens & Rector	Vestry & Rector
Rector	Rector		Rector		

1. Individual expectations, affirmations, disappointments.
2. Consensus expectations, affirmations, disappointments.
3. Share findings, discuss for clarity (only!).
4. Prepare for negotiation.
5. Negotiate a memorandum of agreement.
6. Approve memorandum of agreement.

The six steps of the process are as follows:

Step One is homework to be done individually by Vestry members and the Rector. Prior to Step One, the consultant meets with Rector and Wardens and provides them with the explanations and handout material which they will need to assign the homework to Vestry members. Each Vestry member, for example, is asked to think through what their most important expectations of a

Rector are, and to select two or three in which the Rector's ministry can be affirmed and two or three in which they would like to see change.

In Step Two, the consultant helps the Lay Vestry collect and sort individual affirmations of the Rector and targets for change and select three to five of each which are agreed to be valid and of top priority. Wardens prepare a brief written summary of results. Consultant helps Rector with a similar summary of his/her top three to five affirmations of the Vestry and targets for change.

Step Three is a brief meeting, sometimes held after church or at the end of a regular Vestry meeting, at which the Vestry and Rector exchange written summaries and ask each other enough questions – for clarity only, no debate – to be absolutely certain of knowing what each summary means.

In Step Four, the consultant helps the Lay Vestry to prepare its Wardens for negotiation, and helps the Rector to prepare himself/herself for negotiation. Emphasis is on getting clear about what can and cannot be agreed to, getting ideas in advance on possible compromises, possible combinations between Vestry targets and Rector targets, and possible ways to implement agreements (“how to’s”).

In Step Five, the Wardens and Rector negotiate, with consultant as mediator. The object is to reach mutual commitment to as many as possible of the targets for change; to find synergistic combinations; to find constructive compromise where full agreement is not possible; and to “agree to disagree” where neither is possible. Rector and Wardens collaborate on preparing a written Memorandum of Agreement summarizing the results. (If there are “agree to disagree” items, a time is specified, usually one year later, when the issue will be revisited, and there is agreement not to heckle each other about the issue in the meantime.)

In Step Six, usually as an item of ordinary business at a regular Vestry meeting, the full Vestry approves the Memorandum of Agreement.

The bad news about this process, which is already apparent, is that it involves a lot of work. Step 1 takes about an hour. Steps 2-4 total about five hours of meetings for everybody. Step 5 typically takes 2 hours, but can take anywhere from one hour to eight hours or more for the Rector and Wardens, depending on how complex the issues are, and how much similarity there is between Vestry targets and Rector targets. That adds up to too much work to consider undertaking every year, ordinarily. A three-year cycle, with a brief annual review of the progress toward agreed improvement targets in the intervening years, is a more reasonable schedule.

The good news is that it works. Most of the growing number of parishes who have used the process have been enthusiastic about the results, and have felt that the investment of time and effort was well worthwhile. Any parish which is finding its Rector Evaluations unsatisfying, or is conducting them too infrequently or not at all because of the awkwardness and pain involved, should be encouraged to give Mutual Ministry Review a try.

Mutual Ministry Guide 2

A MODEL FOR MUTUAL MINISTRY REVIEW (MMR)

Purpose:

- + Address *shared* ministry of Rector and Vestry
- + Identify affirmations and perceived needs for improvement in each area of ministry selected for review
- + Agree on improvements needed and timeline for progress review

Primary Participants:

- + Rector
- + Vestry
- + Consultant

Secondary Participants: (if desired) Parish Commissions or Focus Groups

Target Outcomes:

- + Rector/Vestry mutual affirmations
- + Mutual selection of important targets for improvement efforts
- + Strengthened Rector/Vestry collaborative problem-solving relationship

Time Required: See each step below. Times are approximate. This model for MMR requires five Vestry meetings, three of which can either be very brief special meetings or regular meetings at which the MMR step is included as an item of business. Total elapsed time may vary from six weeks to three months, depending on frequency of meetings, complexity of issues and existing level of trust between Rector and Vestry.

Consultant's time required varies accordingly, but is usually at least eight hours total. Asterisks (**) follow each step in which the consultant's presence or participation is recommended.

Process: (The process below assumes the Rector and/or Wardens have already conferred with the consultant, either by phone or in person.)

1. Introduce process to Vestry: Rector and Wardens introduce the MMR process and provide a list of ministry areas from which members will select those they believe are most important to review. (The attached "SWEEPS" model provides a good check-list from which to select ministry areas. Parish goals are another possible source.) (15-30 min. Suggest doing during regular Vestry meeting.)

2. Identify Individual Affirmations and Desired Improvements:

- a. Vestry members and Rector do “homework” individually. Each Vestry member identifies two or three ministry areas in which Rector is making significant positive contributions, and two or three areas needing improvements. These should be described in writing as specifically as possible. Rector does same for Vestry. *(30 min. – one hr. individually)*
- b. Rector and Vestry members send written comments to consultant for consolidation.
**

(If desired and agreed upon, information can also be obtained from Commission members and/or parish focus groups and sent to consultant.)

3. Identify Consensus Affirmations and Desired Improvements:

- a. Vestry meets with consultant to discuss consolidated responses, reach consensus on and prioritize three to five areas of ministry for affirmations, and three to five areas for desired improvements by Rector. *(Two hour special Vestry meeting)* **
- b. Rector meets with consultant to do the same for Vestry. *(One hour)* **

4. Share Prioritized Affirmations and Desired Improvements: Vestry and Rector meet together, share write-ups of results from Step 3, and *discuss for clarity only*. No debate at this stage. *(15-30 min.)*

5. Prepare for Negotiation:

- a. Vestry members meet with consultant and discuss results of Steps 3 and 4 to the point that wardens feel ready to negotiate and reach agreements with Rector, with confidence they know what Vestry would and would not approve. *(Special two-hour Vestry meeting)* **
- b. Rector discusses results of Steps 3 and 4 with consultant in preparation for negotiation. *(Approximately one hour)* **

6. Negotiate: Rector and Wardens meet with consultant to negotiate agreement on a mutual agenda for changes to be undertaken by both Rector and Vestry within the next year or two, with provision for review of progress at specified time intervals. These agreements are documented in a Memorandum of Agreement. *(At least one hour, probably more – depends on complexity.)*
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7. Approve Memorandum of Agreement (MOA): Total Vestry (Rector and lay members) approves MOA. Rector and Wardens sign. *(10 min. – easy to do at regular Vestry meeting)*

Mutual Ministry Guide 3

MUTUAL MINISTRY REVIEW: OBJECTIVES

- To celebrate what is going well and to identify what needs attention/change
- To give clear and reliable feedback; speak the truth in love
- To identify lay and priestly leadership development needs
- To minimize unrealistic expectations
- To renew/establish goals and priorities for the next period of time
- To deepen rector/vestry relationship and enhance communication for the building up of the Body

Goals/priorities should be:

Limited in number

Specific

Measurable, as much as possible (how will we know we've been successful)

Achievable, within the time frame

MUTUAL MINISTRY REVIEW: STANDARD QUESTIONS

1. How did we live out/put into action our Mission Statement (the Gospel) this year?
2. What was a highlight of our ministry this past year – with one another? In the world? Or, what was the most positive activity in our parish during the past year? Who was responsible for making it happen?
3. Whom do you want to thank?
4. What now needs the attention of the rector/vestry? What would you like to change?
5. What task/goal is most important for the coming year?

MUTUAL MINISTRY REVIEW: OTHER QUESTIONS

1. How would you describe the quality of our parish community life this past year?
2. Last year, we set _____ as a goal. How did we do?
3. What disappointed you about our ministry/mission this past year? Or, what is our greatest weakness? What is our greatest need?
4. How do you feel about our liturgy and worship life?
5. What attracts newcomers to our parish? What keeps them/turns them away?
6. How visible and available is the vestry to members of the congregation?
7. What do you believe God is calling us to do in the next ____ years?
8. How do you feel the vestry functioned/lived up to its commitments this year? The rector?
9. What did you learn this year? How did you grow?

Mutual Ministry Guide 4

Mutual Ministry Review

OBJECTIVE

By the end of our time together we will have addressed three separate questions, each designed to enable us to focus more broadly on the nature of our collaborative ministries to our congregation. We are trying to understand three areas of interest for us all:

1. *What are the areas in which you see St. _____ working well and, indeed, even excelling in its ministry both within and outside the parish? In other words, what are we doing well?*
2. *What are some of the areas in which you feel we need improvement? What needs attention and who might be doing it?*
3. *What might be our best “dreams” for the future of this parish?*

PROCEDURE

Take a few moments to think about these areas and consider what your thoughts might be in each of the three. Using this form, jot down your thoughts. When are ready, please make your entry on the provided newsprint. You may find that others have already mentioned what you had in mind. At that point you might want to move on to your next idea.

Next, the entire group circulates among the newsprint and places “dots” next to the items that strike you as important. Place only one of your dots next to each item that you believe has importance.

After everyone has had time to write their comments on the newsprint and to place “dots” on those items that were important to them, the rest of the time is taken up with discussion. The MMR is less of a time for planning action-steps and more of a time to get ideas out that will, no doubt, be enacted later.

Question #1 – What are the areas of our ministry together at St. ____ we feel are going well and are successful?

Question #2 – What are the areas of our life together at St. ____ that you feel need attention or improvement?

Question #3 – What are your “dreams” for the future of St. ____?

Mutual Ministry Guide 5

From The Nonprofit Board Book, Independent Community Consultants Exhibit 9-4: Board Assessment Questionnaire

Directions : The following instrument is designed to help members of a nonprofit board of directors assess their performance. There are no right or wrong answers. The instrument is intended only as an aid to the board in defining areas in which it is not meeting the expectations of its members.

Board performance is divided into sixteen functional areas on the following pages. Each area is defined and accompanied by a scale that ranges from 1-10. There is a description of board behavior at each end of the scale.

Put an "S" above the letter on the scale where you think your board's performance should be. Put an "I" over the letter that represents where you think the board's actual performance is. Each scale should have an "S" and an "I" marked when you complete the form.

An Example:

Personal knowledge. The degree to which board members have real knowledge of each other.

Most board members barely know the names of the others

 A B C D E F G H I J

Board members frequently know each other intimately. It's just "one big family."

REMEMBER: I = "is"... S = "should be"

1. Information. The degree to which board members actively seek information about the operation of the organization's programs and services.

There is a high demand and active search for detailed information about the organization's performance.

 A B C D E F G H I J

Board members seek little information about the organization's performance: They simply accept what is given.

2. Values. The degree to which board members consider the value implications of their policies and organizational behavior.

Values are frequently discussed and considered in decisions.

 A B C D E F G H I J

Values are almost never openly discussed.

3. Independence. The degree to which the board depends on staff recommendations and input for its decisions.

The board almost always follows the staff's suggestions

 A B C D E F G H I J

The board listens to staff ideas but frequently reaches different conclusions.

4. Ambassadorship. The degree to which members of the board represent the corporation to others in the community, both formally and informally.

Board members almost never represent the organization, seeing this as a staff function.

 A B C D E F G H I J

Board members aggressively represent the organization to others.

5. Preparedness. The degree to which the board anticipates and plans for the future of the organization.

Board members frequently point out long range opportunities or potential trouble spots for the organization.

 A B C D E F G H I J

Board members generally do not discuss the organization's future except when faced by problem or crisis.

6. Attendance. The degree to which board members actively show concern for ensuring attendance at board and committee meetings.

There is very little concern or discussion about individual attendance or absence at meetings.

 A B C D E F G H I J

Members are actively praised for good attendance or criticized for poor attendance.

7. Board Orientation. The degree to which the board takes time to provide orientation and training to the members of the board.

Almost no time is devoted to orientation, training and briefing of the board members.

 A B C D E F G H I J

Background briefings, orientation, or training activities occur almost constantly.

8. Resource Development. The degree to which the board defines resource development – acquiring equipment, money, volunteers, staff, etc. – as a board or staff function.

Resource development is almost entirely left to staff.

 A B C D E F G H I J

The board takes primary responsibility for resource development.

9. Committee Activity. The degree to which the board carries out activities through its committees.

Committee activity is rare: The entire board does almost all of the work.

 A B C D E F G H I J

Almost everything the board does is first reviewed in a committee.

10. Formal Leadership. The degree to which the chair and other officers provide leadership to the board.

The board's officers take the lead in almost everything the board does.

 A B C D E F G H I J

The officers are passive except in carrying out routine procedural duties.

11. Special Service. The degree to which the board members volunteer for extra duties in response to organizational needs.

Members frequently offer assistance and volunteer for organizational support activities.

 A B C D E F G H I J

Board members frequently avoid special services to the organization.

12. Accessibility. The degree to which the board members are open to the organization's clients or constituents for comments about and criticism of the organization.

Board members are often used as channels of communication by clients and constituents.

 A B C D E F G H I J

Board members are almost never used as channels of communication by clients and constituents.

13. Special Interest Representation. The degree to which board members seek to represent special interests on the board.

Board members frequently speak from a special interest point of view.

 A B C D E F G H I J

Board members almost never speak for special interests.

14. Mission Agreement. The degree to which board members agree on the purpose of the organization.

Board members frequently disagree about the purpose of the organization.

 A B C D E F G H I J

Board members almost always agree on the purpose of the organization.

15. Initiative. The degree to which board members initiate ideas and action within the organization.

Almost all board actions are in response to staff initiated issues or ideas.

 A B C D E F G H I J

Many board actions begin with member or committee initiated issues or ideas.

16. Openness. The degree to which board members are honest in communicating their feelings to other members.

Most board members act as if they have no feelings during a meeting.

 A B C D E F G H I J

Board members frequently show their emotions during a meeting.

SCORING: Three issues can be looked at in scoring this instrument: The distribution of the “I” responses, the distribution of “S” responses, and the “gaps” between the I’s and S’s. For instance, if the board members report a wide range of I’s on an item, the board analysis should focus on why people see the board so differently. On the other hand, if there is a wide range of S’s on an item, then the board should focus on agreeing on the members’ expectation in that area. A wide gap between the I’s and S’s on an item indicates individual member dissatisfaction with that area of the board’s life and the area may be one in which board members are most willing to pursue change.

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