

# **LIVING INTO OUR MINISTRIES**

## **The Mutual Ministry Cycle**

### **A Resource Guide**

**Collaboratively Developed By**

The Episcopal Church Foundation

The Episcopal Church, through the Office for Ministry Development

and the Church Deployment Office

and

Many Diocesan Representatives

**Written By**

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The Episcopal Church Foundation, 815 Second Avenue, New York, NY 10017

Printed in the U.S.A.

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# PREFACE

Most likely, you are opening this resource guide to learn how to review the ministries in your congregation. You might also open it because something has happened that prompts a desire to review church leaders' effectiveness or because you want to grow as a community. Perhaps the best reason for opening this guide is that you are ready to embrace the mission of the church in your location and fully to articulate and coordinate the many ministries that help fulfill that mission.

Regardless, you arrive with a question: How do we conduct reviews of ministry? Here's the short answer:

- Be honest about why you're doing reviews.
- Find out what's been happening.
- Check up on what you said you would do the last time you planned for the future.
- Find out what sense you can make of what happened.
- Compare it to what you said you would do.
- Identify how you feel about all that.
- Decide what you are going to do next.
- And, because most people forget it during reviews, love each other in all your imperfections as much as God loves you.

Simple, yes? Well, ministry review would be simple if we all had the same eyes, the same ears, the same hopes, and the same complaints. Because we don't, here's the bad news about ministry review:

- Ministry review will take longer than you think it should.
- People use language differently.
- People have different hot buttons.
- People have different reasons for seeking reviews.

In addition, we come from different backgrounds—corporate life, education, medicine, law, home, civic leadership, and seminary. Depending on our roots, each of us has different ideas about work and what is important.

Given all these differences, unless you know the language of angels and the mind of God, consider the framework provided in this guide. Its objective is simple: to help everyone in the congregation live together into our collective ministries.

The audience we have intended for the entire guide includes diocesan facilitators, deployment officers, wardens, and clergy. Some parts, especially the introduction, will be useful for the whole vestry as a starting conversation on mutual ministry. The document is an educational package with a variety of tools. If you have decided to use the guide, here's a road map of what's ahead:

**Section 1** provides a framework for thinking about mutual ministry in general. It introduces the idea of review in the context of ongoing life in the congregation. By itself this section could be a starting point for a vestry study before deciding whether to continue.

**Section 2** begins with preparation for review and then offers a variety of methods. The choice of approach depends on your situation. The section provides an overview of all parts of the mutual ministry cycle and then concentrates on review activities. Other resources provide more detail for planning and conducting ministry.

**Section 3** takes up the critical issue of reviewing the ministry of all baptized people. It flows from the idea that ministry must be nurtured in the congregation, so that all of us can exercise our ministry gifts wherever we live and work. This may be the most important review of all.

**Section 4** tackles the often difficult topic of leadership reviews. All leaders, lay and ordained, are considered.

The remaining sections—5, 6, and 7—provided facilitators with additional tools and resources.

We urge you to pick the parts that work for you. Start small and steadily expand your ministry review approaches. Review is a natural part of congregation life that can either enrich the community or create much harm. Handle it with care.

# Acknowledgments

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Idaho  
Kansas  
Maine  
Northern California  
Olympia  
San Diego





## Section 1

# DOING MINISTRY TOGETHER

## AN INTRODUCTION TO THE MUTUAL MINISTRY CYCLE

This is my commandment, that you love one another as I have loved you. No one has greater love than this, to lay down one's life for one's friends. You are my friends if you do what I command you. I do not call you servants any longer, because the servant does not know what the master is doing; but I have called you friends, because I have made known to you everything that I have heard from my Father. You did not choose me but I chose you. And I appointed you to go and bear fruit, fruit that will last, so that the Father will give you whatever you ask him in my name. I am giving you these commands so that you may love one another.

—*John 15:12–17*

We live in very busy times. We live in a society in which complex plots are solved in 30-minute TV episodes. In the midst of this environment, we are called to love one another, follow Jesus, and do what he asks us to do. How in the world can we keep track of and manage the ministries through which we attempt to respond to his commands? This guide is the result of an effort by many people to provide reflections and processes to organize, reflect on, and adjust what we do to build up the whole body of Christ.

One of our responses to pressures of contemporary life is to increase our demand for accountability. Physicians, teachers, elected officials, students, and ministers of all sorts are expected to perform better and to be able to justify both what they do and how much it costs. Are our expectations excessively high? Is the demand for accountability rooted in a desire for assurance that somebody else is in control? In the case of the church, have we lost sight of our mission, and do

we consequently have unclear expectations of each other? This guide attempts to change the focus of our conversations from individual accountability to corporate accountability—that is, to mutual ministry. Good stewardship of the resources (time, talent, and treasure) with which we have been entrusted is essential. To be consistent with our mission, planning and reviewing must be done in a way that builds trust rather than breaks down the community.

Planning for ministry, doing the work, and reviewing or reflecting on what we have done constitutes the mutual ministry cycle. This introduction to the guide describes the cycle, connects it to Scripture, and provides an overview of crucial steps for its implementation. The balance of the guide focuses on the review aspect of the cycle, because it has been the source of so much conflict and lost opportunity.

### THE PURPOSE OF THIS GUIDE

We enter the Christian community through baptism. Both the one being baptized and the community that supports the new member make promises to one another. These promises are expressed in the baptismal covenant.

#### *THE BAPTISMAL COVENANT*

- Believe in God the Father.
- Believe in Jesus Christ, the Son of God.
- Believe in God the Holy Spirit.
- Will continue in the apostles' teaching and fellowship, in the breaking of bread, and in the prayers.
- Will persevere in resisting evil, and, whenever we fall into sin, repent and return to the Lord.
- Will proclaim by word and example the Good News of God in Christ.
- Will seek and serve Christ in all persons, loving our neighbors as ourselves.
- Will strive for justice and peace among all people, and respect the dignity of every human being.

—*Book of Common Prayer*, p. 304

The mutual ministry cycle is an opportunity to join one another in fulfilling these promises. The guide provides ways to organize our efforts and helps us respond to the direction further established at General Convention, 2003, to move from maintenance to mission. More specifically, the guide is intended to

- help those leading and planning reviews to understand the theology of mutual ministry;
- provide a clear understanding of how a congregation will benefit from the process;
- provide a clear rationale for regularly performing mutual ministry reviews as part of the mutual ministry cycle;
- encourage those in leadership roles to plan and implement ministry reviews;
- provide a resource for designing a review process that
  - meets the needs of specific congregations;
  - helps planning teams develop helpful review questions unique to their congregation;
  - clarifies what aspects of ministry need to be focused on.

As a result of using this resource, congregations should know

- what is going well;
- what needs attention;
- how they will give reliable feedback, spoken in truth and love;
- what lay and clerical leadership development needs exist;
- what reasonable expectations they have of each other;
- what goals and priorities to adopt for the next period of time.

In addition to addressing these planning-oriented questions, the review process offers us the opportunity to answer questions about our baptismal work:

- How are we equipping the saints to be about their work in the world?
- How are we being stewards of God's gifts, including money, time, and talent?
- Who is hungry in our community in either body or soul, and how shall we nourish them?
- Who among us is sick and needs tending?
- Who in our community is imprisoned and needs to be visited?

- How are we treating each other and being the body of Christ?
- How are we continuing in the Apostle's teaching and fellowship, in the breaking of bread and in the prayers?
- How are we seeking reconciliation with each other and God when we fail to live up to our promises?

Among the congregations that use this guide, there are varied forms of ministry and leadership. For simplicity, we will refer to the body of lay leaders elected by the community as a vestry, and we will refer to the ordained leader as rector. We realize this is not the language used in some total ministry, cluster, or multi-point congregations. We have used both feminine and masculine pronouns to honor the much needed and growing diversity of leaders, both lay and ordained.

### WHAT IS MUTUAL MINISTRY?

Flowing from our baptismal covenant, this guide is not simply about ministry. It is based specifically on mutual ministry. Mutual ministry is a radical reframing of the idea that strong individuals are solely responsible for the well-being of the whole community. The individual approach has often resulted in clergy isolation and burnout, or blaming—either of the community by its clergy, or clergy by the community. The “strong individual leader” approach also misses the abundant talent available to the community when ministry is seen as a common effort. All members of the Christian community, not just the ordained clergy, are called to be ministers.

Throughout Scripture and our tradition, we are all called to ministry. In baptism we are made members of the eternal priesthood, and we are all called to say the prayers, to come together in fellowship, and to continue the Apostles' teaching. The apostle Paul wrote his letters to communities, not only to the leader of the community. Most importantly, Jesus reminds us in his summary of all the Law and the Prophets that we are to love God and love our neighbors as ourselves. This command suggests that we are to live in relationship, and that calls for mutual ministry. Thus mutual ministry, while a radical reframing of leadership, is also fundamental to Christianity.

## CATEGORIES OF MINISTRIES

We express our ministries in a variety of ways. We do much of our work as a community. Each Christian is on an individual journey and called to specific work. Some of us have also been designated to serve as leaders. Whether we view ministry from the perspective of the community, as an individual, or as a designated leader will affect our perspective. All ministry, however, springs from the common call of our baptism.

- The community

As we go about building up the body, we work together in programs such as music, education, stewardship, care of facilities, worship, and outreach. In contrast to the ministry carried out by individuals in their daily lives, these ministries require coordinated planning, implementation, and review within the congregation.

- Individual Christians

The fundamental ministry is that of baptized individuals. When we understand our work as an expression of our God-given gifts and an offering to the people around us, everything from preparing food to building houses, teaching, or mending damaged hearts—both physically and spiritually—can be seen as ministry. The fact that we do most of our work with other people makes it “mutual ministry,” whether it takes place as part of a church program, in our homes, or at our secular jobs. Planning, conducting, and reviewing our lives helps us fulfill our baptismal promises and provides common ground for reviewing the work of the community.

- Designated leaders

Many lay and ordained ministers, unpaid or paid, take on leadership roles such as rector, vicar, senior warden, education director, or youth counselor. Although these ministries are still mutual (in that they cannot be conducted in isolation and are intertwined with ministry programs), their visibility and significance to the community make it appropriate for us to give them additional attention. Mutual ministry addresses individual responsibilities, collective responsibilities, and the relationships in which they are carried out.

All three of these categories—the community, individual Christians, and designated leaders—are essential to mutual

ministry. Sections 2, 3, and 4 of this guide offer distinct methods for reviewing them.

### BIBLICAL IMAGES AND MUTUAL MINISTRY

History, sports, and entertainment emphasize heroic individual leaders who single-handedly save the day, while we, as the church, are called to a different understanding. Our work occurs in the body of Christ, and Scripture gives us images to reflect on authentic change and responsibility in that context.

#### *THE BODY OF CHRIST*

But speaking the truth in love, we must grow up in every way into him who is the head, into Christ, from whom the whole body, joined and knit together by every ligament with which it is equipped, as each part is working properly, promotes the body's growth in building itself up in love.

—*Ephesians 4:15–16*

The writer of Ephesians teaches us that we are called to be the body of Christ and that our calling is to build up the body. Those of us who work in other kinds of organizations might find it odd to think of a congregation as a living body, but the metaphor illustrates the essential interconnectedness of all members of the community. All parts of the body are needed, and each part depends on all the others to carry out the work of the whole. A hand cannot feed itself. A stomach cannot prepare its meal. In addition, each part has a distinct role to play on behalf of the whole, and in a healthy body, the parts do their own work but not the work of other parts. This division of labor is essential to the well-being of the whole body. If one part of the body overfunctions (takes on too much work) or underfunctions (does not do its part), the whole body suffers.

The image of the church as the body of Christ also reminds us that we need to care for (“build up”) that body, just as we need to care for our own physical body. Because all the members of the body are interconnected, we can think of the work we do to build up the body as “mutual ministry.”

#### *THE VINEYARD*

Let me sing for my beloved my love-song concerning his vineyard:  
My beloved had a vineyard on a very fertile hill.  
He dug it and cleared it of stones,

and planted it with choice vines;  
he built a watchtower in the midst of it,  
and hewed out a wine vat in it;  
he expected it to yield grapes, but it yielded wild grapes  
For the vineyard of the Lord of hosts  
is the house of Israel,  
and the people of Judah  
are his pleasant planting.

—Isaiah 5:1–2, 7a

Throughout the Bible, images of fruit and vineyards are used to describe the people of God and the work to which we are called. They provide wonderful ministry-related metaphors: the planting of crops, the sweetness of harvest, and the fruits of the spirit. Yet, as Isaiah reveals, the grapes are not always sweet, and that makes the images even more suitable as a framework for mutual ministry. Caring for a vineyard requires hard work, without which there will be no harvest, and ministry demands similar effort. Farming is cyclic: year after year, crops are planted and tended, and fruit is gathered and stored for the winter. Ministry is also cyclic: planning, action, and review are repeated, season upon season—never ultimately perfected and never completely finished. In order to bear the best fruit, a garden or vineyard needs to be tended over the course of many years, and effective ministry depends on similar ongoing nurture.

Periodically, when good fruits are gathered, we celebrate and give thanks for the rich harvest. How much more inviting celebration is than “reporting on program outcomes”! And when we labor well, Paul tells us, the harvest will be love, joy, peace, patience, kindness, generosity, faithfulness, gentleness, and self-control. It is for these fruits that we are held accountable.

## THE MUTUAL MINISTRY CYCLE

In Genesis, we are told that God worked in a series of steps: there was an intention (the spirit hovered over the waters), there was activity (God created the world), and there was a review (God said it was good). Likewise in the vineyard, there is planning for the type of vine, there is planting and tending, and there is harvest. These same phases also apply to mutual ministry, and we will call them planning, implementation, and review. Over the life of a congregation, this cycle will occur repeatedly and can be used by vestries to help organize their work.

Just as planting the vines, working them during maturation, and harvesting the grapes are all crucial events for the well-being of the vineyard, all three phases of the mutual ministry cycle are necessary to the work of the church. Unfortunately, some congregations focus on only one or two phases. Some groups attempt the review phase isolated from other components of the mutual ministry cycle and for the wrong reasons. For example, a small congregation requested help from its diocesan resource office to conduct a mutual ministry review. They had no ministry plan and were not sure what work was going on. The review was actually being undertaken as a way to evaluate and criticize the clergy, not as part of a well-thought-out and cohesive mutual ministry effort. The fruits of that effort were not love, joy, peace, or gentleness!

On the other hand, vestries sometimes design lavish programs in a planning phase that are disconnected from the actual work. A large congregation invested extensive resources to create a strategic plan. The resulting document was later found, forgotten, on a dusty shelf. The rector and community had spent time planning but did not actually undertake the work together. This particular congregation had hired a rector who was almost an archetype of the heroic leader, and, consequently, there was so much distance between the vestry, the community, and him that no one acted on the plan. In the end, no one was willing to participate in the review phase that could have created opportunities for changes in expectations, program priorities, commitment, and relationship. The problem in both this example and the one above was not with what was done in the planning or review phases per se, but in the relationships among the participants and in the incomplete mutual ministry cycle.

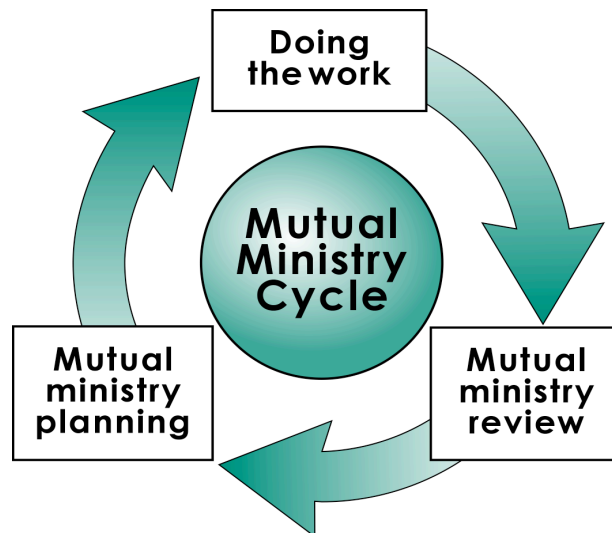
Although annual planning, working, and review are standard phases, mutual ministry cycles do not have to be of a fixed length. Projects may last a few months or many years. Ministry programs may happen once or may be repeated. Regardless of frequency or duration of ministries, all three phases should be included to obtain the full benefits of mutual ministry. For simplicity, the examples below address regular, ongoing, annual mutual ministry cycles within entire congregations. (The important and special case of ministry review just after a clergy calling process is considered in section 2.)



## THE STEPS

### CONDUCTING A COMPLETE MUTUAL MINISTRY CYCLE

Cycles have no beginning and no end. Review can only take place when work has occurred. The work is based on a plan. The plan emerged because someone reviewed a situation and decided on a course of action. So where do you enter the cycle if it is new to you? While many business models suggest planning as the first step, we suggest at least a brief review to get started. Doing such a review is like finding your bearings in a wilderness—it helps you find out where you are before planning your way out. As each cycle is considered, the phases will become clearer and will illuminate more about your congregation's life.



#### **Review**

1. Find out what has been happening.

This step requires collecting information based on people's observations. A reliable approach for the first review is to ask "What has gone well?" Beginning with an appreciative question counterbalances fault finding and still allows problem identification. There will be time later to identify adjustments that need to be made in future ministry. Other beginning questions include "What happened? What do you appreciate about the recent past?" You can also gather information about goals met (if they were established), unexpected events, finances, and the various ministries' activities.

The key is to become keen observers of your congregation. (There are more details in section 2.)

### 2. Understand what happened.

In this step, you make sense out of the information gathered. What did you say you would do? How does that compare with what you see? How do you explain what happened? How do you feel about what happened? Open, honest, and respectful conversations are essential.

### 3. Acknowledge contributors and situations.

Whom do you need to thank? People besides the clergy and the vestry are involved in mutual ministry. Make sure they are thanked. Seek to understand why things happened as they did. Deal with the grief often experienced when programs end or specific ministers move on to other work. Celebrate the harvest of your labors.

## Planning

### 4. Make immediate adjustments.

Based on what you observed and learned in the review, what do you need to change right away? What can you stop spending energy on—either because the program is complete, for example, or because you want different results?

### 5. Prepare for the future you intend to create.

It is not enough just to dream. There must also be a collective intention to move toward a particular vision. It is not enough to simply want to grow in hope of meeting budget needs, for example. What do you want to become as a community? To what do you aspire as witnesses to the ongoing revelation of Christ and in fulfillment of your baptismal promises? This is an opportunity to come together around the mission of the church and find common ground in your future. It allows you to move forward together.

### 6. Set goals.

Decide what work to undertake. To some of us, this is odd language for a church and conjures up images of production goals (although the disciples were faced with feeding the multitudes—what a goal!). Setting goals is nothing more than saying, “Of all the possible work of the kingdom, here’s what we’re taking on this year—as informed by the review we just completed.” (Some models distin-

guish carefully between goals and objectives. Just get clear about what you are going to do.) For example, “We’re in Bethlehem, and we want to be in Jerusalem.” “We have ten of our kids in Sunday school, and we want to serve all 30 kids in the neighborhood.” “We are feeding 10 percent of the hungry, and we want to double that.” Goals also include clear time frames. It is fine to say that in ten years we will double the number of people served through a food bank, but that goal is different from one with a one-year time frame. Be specific. The goals must be established with clear understanding of what has worked and not worked in the past, what the current situation calls for, and what resources are available.

There is a tension between setting goals that stretch our thinking and goals that seem overwhelming. A reasonable practice is to imagine the effort it will take to reach the goal and how much you are willing to stretch in pursuit of mission. If the result is overwhelming, back off a bit. If it seems terribly easy, without adventure, move out a little farther. Each congregation will see goal setting differently, and its goals must be scaled to the resources and circumstances of the community. It is said that God will not demand anything of us that we are not able, with God’s help, to achieve.

#### 7. Define roles.

Although we are emphasizing the mutuality of ministry, we must also be clear about who does what. Many visions have been lost and goals have been missed because no one was identified as responsible for implementation. In the vineyard, the leaves do not become the wine, and the roots cannot take in the sun’s energy. In church communities, some people teach, some people feed the hungry, some people visit the sick, and some know how to manage finances. Of course, roles are most easily fulfilled when they match individual ministry gifts. Mutuality is maintained when we understand that all activities are interdependent, and individuals perform best when they work in concert.

#### 8. Communicate.

As vision, goals, and roles are developed, be sure to engage the congregation in understanding not only the words but also the meaning. If a vestry has established a vision and set goals for the coming year, communicate them to the whole

community. This step allows the community to embrace the leaders' plans and, if needed, make further adjustments.

### **Implementation**

#### **9. Act.**

Do it! Persist! Help each other! Do not work alone! When plans encounter the real world, life happens. Make adjustments from time to time without throwing out the whole plan. Rest and be nourished along the way. Allow the work to mature. Near Siena, Italy, there is a vineyard owner who does not allow anyone to enter his property between mid-July and mid-August. Why? He knows from generations of experience that the grapes need time to mature and that constant tinkering interferes with growth. Likewise in congregations, there are times simply to let the work mature. As you consider these broad steps, remember that Diocesan Resource Offices have more information on planning, visioning, and implementation.

## THE BENEFITS OF USING THE MUTUAL MINISTRY CYCLE

Attending to all the phases of the cycle helps keep expectations clear and produces many benefits. Carrying out the full mutual ministry review

- enhances individual understanding of how we are living our baptismal promises;
- produces clear objectives for the community as a whole in context of a vision;
- identifies specific observable goals for the year;
- establishes clear relationships between annual goals and the long-term mission;
- enables honest review of past effort;
- provides an opportunity to make adjustments;
- creates a framework in which to establish expectations for individual leaders;
- links the congregation's work to larger, diocesan ministry and mission.

In addition to the tangible benefits described above, the mutual ministry cycle helps create useful dynamics and en-

ergy in the congregation. These benefits, though less visible, are equally important.

- Creative tension

The combination of mutual ministry review and planning creates exciting opportunities for the future. Review and planning should generate some disparity or dissonance between what has happened and what you want to happen in the future. Imagine a rubber band stretched between your hands. Your left hand represents your solid understanding of what has happened. Your right hand represents the future. Pull the two apart. The tug you feel is “creative tension” and is the energy you need to move forward. You can shoot the rubber band across a room with that energy! Tension is also created when mutual ministry review and planning are done well. For some people, the uncertainty of the future feels uncomfortable, and they find ways to eliminate the tug. Others find it exciting. The creative tension established by good planning and review can invigorate and focus a community’s effort, and it can result in resentment that things are changing. Future-oriented leaders will need to manage these two perspectives.

- Planning to capacity

Part of what we derive from the mutual ministry cycle is open agreement about our mutual expectations and selection of activities that are consistent with our capacity. Without regularly connecting review and planning, it is easy to plan more than we can handle, and this leads to disappointment with each other and cynicism about planning.

- A sense of community

In the very work of planning, doing, and reviewing, community is continually constructed and deepened. The absence of mutuality in the effort has serious consequences. The drive for accountability in education, commerce, and health care often results in inappropriate competition and feelings of isolation. Community cohesiveness dissolves. Sad stories emerge from some of our leading medical and law schools in which competition is so fierce that students sabotage each others’ work. In the church, clergy often feel isolated and take on unnecessary burdens, leading to burn out and the untimely end of ministries. Mutual ministry—planning, implementing, and reviewing our work together—serves as a powerful

antidote to these experiences. The cycle provides a framework to gather the community for mutual encouragement and rededication to the future.

### KEYS TO SUCCESSFUL MUTUAL MINISTRY CYCLES

In order to attain the benefits described above, congregation leaders need to keep three practices in mind.

#### 1. Do it regularly.

Like physical exercise, implementing the mutual ministry cycle can be a little painful the first time, but it gets easier. Waiting longer than a year between reviews makes it difficult to be specific about what has happened and to connect recent events with new plans. Sometimes it will be appropriate to undertake major revisions and planning. Other times, when a long-term plan is in place, it will be enough to check in. Do what makes sense.

#### 2. Get help.

Especially at the beginning, a lot of us feel awkward sharing our observations. We can also be inappropriately judgmental. An outside facilitator is essential to guide the process and help make sense out of what is being said, so that all the members of the community can be heard and their views acknowledged.

#### 3. Decide who needs to be involved.

Ideally, every active member of the community will be part of the process. When that is not feasible the elected vestry can represent the community. However, vestries that do not listen to the whole community have difficulty obtaining the support from members needed to do the work. Sometimes there are unrecognized stakeholders. For example, a large, long-established congregation hired an architect to design a major building renovation. When the plans were complete, the vestry rejected them. The building effort remained idle until a vestry member spoke with his grandchildren. They loved the new design, and the vestry member learned that the plan was for the future, not for the past with which the vestry members identified. The planning was not complete or possible to execute until the vestry broadened involvement.

#### 4. Talk to each other.

Essential to all of these approaches is “conversation.” According to *Dictionary of Word Origins*, the word stems from the Latin *conversari*, “to turn about through talking.”<sup>1</sup> Good conversation can flourish in a variety of settings: in workplace groups with trusted colleagues, among volunteers in a parish outreach ministry to homeless people, or in the family. In one sense, conversation is the underpinning of all other aspects of ministry. We are either talking with God or with each other. The very act of speaking with and listening to another person is *mutual* ministry.

### SOME FINAL THOUGHTS AND CHALLENGES

Most people expect rapid results, and those who have invested time, energy, and money in a project rightfully ask if progress is being made. Although assessing results is relatively easy in many kinds of work, mutual ministry presents a number of challenges. Part of the difficulty is that progress in many aspects of ministry happens over a long period. Another challenge is that ministers often have limited control over outcomes.

The late Archbishop Oscar Romero, assassinated as he was celebrating Eucharist in El Salvador, offered a profound, poetic reflection about the nature of our work in the church and about assessing progress. It helps, now and then, to step back and take the long view.

The kingdom is not only beyond our efforts, it is even beyond our vision.

We accomplish in our lifetime only a tiny fraction of the magnificent enterprise that is God’s work.

Nothing we do is complete, which is another way of saying that the kingdom always lies beyond us.

No statement says all that could be said.

No prayer fully expresses our faith.

No program accomplishes our mission.

No set of goals and objectives includes everything.

That is what we are about.

We plant the seeds that one day will grow.

We water seeds already planted, knowing that they hold future promise.

We lay foundations that will need further development.

We provide yeast that produces effects far beyond our capabilities.

We cannot do every thing, and there is a sense of liberation in realizing that

This enables us to do something, and to do it very well. It may be incomplete, but it is a beginning, a step along the way, an opportunity for the Lord's grace to enter and do the rest.

We may never see the end results, but that is the difference between the master builder and the worker.

We are workers, not master builders; ministers, not messiahs.

We are prophets of a future not our own.

It is so easy in our busy world to become wrapped up in plans and reviews to the point that they become the work. That is not the mission of the church. Our job is to love one another, to plant and bear fruit, recognizing that everything that truly matters will be done in God's time. Keep the process as simple as possible; hold its lessons lightly and with love. At the end of the day, we are building the kingdom to feed God's people and to provide a community in which they can grow spiritually. This work is a life-giving adventure filled with promise. By practicing the entire mutual ministry cycle, we continually recommit to the future, regardless of what worked and did not work in the past. Our dream is that all might enjoy robust life, for Jesus said, "I have come that they might have life and have it abundantly" (John 10:10).

### Notes

1. Joseph T. Shipley, ed., *Dictionary of Word Origins*, 2nd ed. (New York: The Philosophical Library, 1985), p. 95.



## Section 2

# MINISTRY REVIEW FOR THE COMMUNITY

## BEING THE BODY OF CHRIST

Now there are a variety of gifts, but the same Spirit; and there are a variety of services, but the same Lord; and there are varieties of activities, but it is the same God who activates all of them in everyone. To each is given the manifestation of the Spirit for the common good.

—1 Corinthians 12:4–7

For just as the body is one and has many members, and all the members of the body, though many, are one body, so it is with Christ. For in the one Spirit we were all baptized into one body—Jews or Greeks, slaves or free—and we were all made to drink of one Spirit.

—1 Corinthians 12:12–13

As reported in the Alban Institute journal *Congregations* (April/May 2002), the evaluation of ministries is a persistently difficult aspect of parish life. In response to the difficulties many congregations have expressed, this section of the guide provides a road map and a number of alternative approaches to the review phase of the mutual ministry cycle. The focus in this section is on the effort of the entire congregation or even diocese.

This section establishes the context for reviews conducted in the church, offers ways to understand your congregation's situation, and suggests how to begin. Then several models are described that can be used as they are or adapted to your particular needs.

## THE CHALLENGE OF MUTUAL MINISTRY REVIEW

Mutual ministry review in churches is different from reviews in business, health care, military, education, or government settings. Our mission is fundamentally different. Consequently, what goes on is different, and how we review our work needs to be different. However, vestries are often composed of people who are leaders in secular roles, and vestry members find it logical to directly transfer review (and planning) methodology from their work world to the church. Let's look at some nonchurch situations where review (or "performance evaluation," as it is commonly called in business) takes place and then adapt those approaches to our context.

In simple production environments, review questions are reasonably straightforward, because the work is visible. Did the workers produce what we expected? Were error rates acceptable? Did the production system meet cost goals? Were customers' expectations met? Was there a profit? Each of these questions can be answered with quantitative data. An observer who has no relationship with the organization can answer the questions, given the right information.

In contrast, knowledge- and information-based work is not so easy to assess. Drawing on the work of management author and guru Peter Drucker, we note that as we move from visible manual labor to the age of "the knowledge worker," we must learn to *ask* how things are going, because most of the work happens between the ears of the worker.

Our expectations and the means of doing the work determine what to include in the review and how to go about it. For example, a priest might celebrate the Eucharist once a week (we can determine if she followed the rubrics), a senior warden might oversee vestry meetings (we can see if he is well organized and finished on time), and a head acolyte might provide clean robes and well-trained servers (we can see the robes and the actions of the acolytes). All these tasks are visible. But what about the pastoral visits no one knows about and the prayers that are said in silence or the subtly skilled youth director who listens to a troubled high school student and helps him make good decisions?

These activities, the stuff of ministry, require us to be skillful observers and celebrate the small changes that happen over time. When we compare the simple production environment

with the church, we can see that a production worker has certain advantages. A production worker can define and control many things. The whole total quality movement in U.S. industry of the 1980s and 1990s was based on the assumption that work procedures could be precisely documented and measured. Great productivity gains resulted.

In contrast, how can we measure the effectiveness of a youth director, a music director, or a Eucharistic celebrant? Our environment in the church demands that reviews be based on mutual agreements, definition of sometimes intangible expectations, and thoughtful reflection together about what happened. We also need to be clear about what can and cannot be directly controlled. Much ministry is done by influencing people, which is difficult to measure—but not impossible to reflect on. Only one review question might be asked of us at the Day of Judgment: “I gave you a life. What did you do with it?” Thorough mutual ministry review includes the visible aspects of the work, the subtle processes required to get it done, and the effect the work has on building up the body of Christ.

Another challenge of reviewing work in the church context is that progress often occurs in stages over time. When control is limited and our ultimate mission is building a large spiritual body in Christ, both hard work and patience are required. Review processes must consider the unique situation of both the congregation and the people involved. For example, a young, new rector has fully grown into her calling. Her efforts as a leader might focus on a few core ministry areas, such as preaching and pastoral care. A more experienced rector might be expected to oversee complex budgets as well as preach. Vestry members who are just beginning to understand mutual ministry might review their own individual callings and activities, while an experienced group could assess all the ministry areas in a congregation. What is essential is to be clear about the congregation’s situation and design the review process accordingly. Subsequently, the vestry’s task is to keep observing and crafting next steps.

### **What MMR Is Not**

Mutual ministry review has been used inappropriately by some congregations, and the consequences have been harmful. The two common errors described here can be avoided by establishing a clear purpose and process for the reviews before they begin.

- **Complaining, blaming, or judging**  
We all know that complaining about last year does not get the garden ready for planting this year. What happened, happened. If errors were made, acknowledge them and move on. Blaming does not move us into the future; judging does not build relationships and trust. But acknowledging what happened clears the way for new growth and new commitment.
- **A chance to “get” the priest**  
It is not unusual for diocesan offices to receive a call for assistance with mutual ministry review when conflict with the rector or vicar is beginning to surface. This request often reflects a veiled effort to create a forum that legitimizes blaming and fault finding. There is certainly a time and place to reflect on the work of all individual leaders (clergy and lay alike), but MMR should not be viewed as an opportunity to sit in judgment on the work of the clergy or other leaders. Rather, it is an opportunity to assess our common effort together and decide where to go.

### **When to Start MMR**

The best time to begin the mutual ministry cycle and preparation for reviews in particular is at the beginning of ministry relationships. Ideally, the orientation to mutual ministry planning and review begins among congregation members during the call process and immediately extends to the newly called person. (It is also appropriate to conduct a mutual reflection with interim clergy before they leave.) To get the new relationship off to a good start, review (1) the parish vision and goals developed during the call process, (2) the new person’s gifts and goals, and expectations outlined in the letter of agreement, (3) the parish profile, and (4) additional sources of information to help establish mutual expectations.

Of course, a congregation can begin thinking about mutual ministry and review at any time it is ready. Excellent times to consider the matter are at the end of one vestry’s tenure or before an annual meeting.

### **Dealing with Conflict**

People often express concern that conflict might emerge if ministries are reviewed. The fact is, it will. Arguments arise because people disagree about priorities, values, work styles, and other matters. Disagreement also occurs because people

think they have been overworked or left out. Sometimes the source of the conflict is as simple as people not being thanked. Sometimes it is as complex as varied interpretations of Scripture. Controversy is not something to be avoided, and it is almost always present to some degree. Conflict does not mean you have failed. It just means you have some work to do.

Speed Leas of the Alban Institute provides a model for assessing how intense a conflict is. Low levels of conflict, while not comfortable, can be healthy. More intense conflict can be pathological and destructive.

### Conflict Intensity Model Based on Speed Leas' Levels of Conflict

Level of Conflict	Objective of the Parties
Level 1 – Problems to Solve	Stay focused on the problem
Level 2 – Disagreement	Protect oneself
Level 3 – Contest	Win
Level 4 – Fight/Flight	Hurt the other and/or get rid of the others
Level 5 – Intractable Situations	Destroy the other

Adapted from Speed B. Leas, *Moving Your Church through Conflict* (Bethesda, Md.: The Alban Institute, 2002), pp. 19–25. Used by permission.

If intense conflict is already present (people are taking sides and labeling each other—levels 3, 4, and 5), get help immediately. Do not use MMR as a means to resolve the conflict. After attending to the deeply rooted issues that generate conflict, use MMR to keep expectations and feelings well aired. If conflict shows up in the midst of an MMR, the outside facilitator will know what to do. Even if intense conflict is not present, if the same issue shows up in two or more reviews with no change, get help on the underlying issues.

## LIVING INTO OUR MINISTRIES

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Keep in mind that when our labors are being reviewed, we take the review personally. We are dealing with issues of heart and soul, not machinery, and it is natural to experience sensitive reactions about the review. Well-designed meetings facilitated by a skilled leader will help participants respond to normal reactions and feelings.

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### *A FACILITATOR*

Don't leave home without one! A facilitator who knows how to gather a community for review and planning helps get the work done in a manner that builds trust and allows everyone to participate. A skilled facilitator also knows what to do when conflict arises.

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## GETTING READY FOR MINISTRY REVIEW

Most congregations will begin ministry review when the senior warden and clergy read this material and decide to conduct a review. The resource also can be used as a guide for the entire vestry or another appropriate body. Be sure that you enter this process in a spirit of exploration and support. If that is not possible, seek assistance from outside your congregation to build basic trust or resolve old conflicts. A number of things need to be done before conducting. The worksheet on the following two pages will help you assess your current situation and make decisions about how to proceed.

## DETERMINE YOUR SITUATION

The following check list will help determine the resources you already have in place. Check all the boxes that apply.

- ☐ If planning and reviews have not taken place in the past, we understand that our first review will be a simple inquiry into what we appreciate and value about ministry and leadership in the congregation and what we want to do differently in the future. No single individual will be reviewed.
- ☐ We have or will develop a vision after the review. We understand that planning and review are most useful when the congregation shares a vision for its future.
- ☐ We have a desire to mature and evolve as a community.
- ☐ We agree to undertake mutual ministry review. Both leaders and congregation members are fully supportive of the process.
- ☐ We have time to be thorough. We recognize that a minimal process in a small congregation takes at least four hours for review alone and that planning will take more time.
- ☐ We understand that mutual ministry happens in cycles: planning and review are equally important but different.
- ☐ We have adopted a philosophy of mutual ministry, knowing that no one minister can do the work of the congregation.
- ☐ We understand the process and results of prior plans and reviews.
- ☐ We have an outside facilitator.

If you find that you have checked only the first two boxes, you will want to follow the instructions below for first reviews. The other boxes can be revisited as you proceed but should be addressed before the actual review meetings occur. Now is the time to obtain a facilitator to help you through the process.

Now answer the following process-design questions to help you further understand your situation. Your answers will help you and your facilitator select an appropriate process.

- What material do you have available from previous mutual ministry efforts? Examples include a vision statement, mission statement, current goals, letters of agreement with leaders, material from a call process (parish profile, leadership position profile), parochial reports, budgets, current financial reports, and data from tools used to gather information, such as questionnaires and surveys. You will want to make the information available to all participants.
- What size is your congregation? Small congregations can easily ask all members to participate. Larger ones may need to survey all members, hold a specially designed large-scale meeting, or create a review team to summarize data.

- How are you organized? In small congregations, the individual leading an outreach effort may also be the person who offers lay pastoral care. In program-oriented churches, an outreach effort may include paid staff and a variety of outreach activities. Involve the people who are responsible for program leadership.
- How long have the current designated leaders been part of the community? If this is the first year of a call, use the first-year model described below. If the leaders—whether clergy or paid lay staff—have been present for a considerable time (five or more years), the review may include reflection on the need for personal renewal. If individuals are nearing the end of their current ministry, the review might include activities to summarize and complete their ministries.

### **Your Objectives**

Next, take time to understand your own reasons for undertaking mutual ministry review. What are the objectives for your congregation? Some possibilities are:

- To acknowledge what is happening in our congregation.
- To evaluate our labors in the recent past. This goal applies to individual Christians (section 3), designated leaders (section 4), and our overall mutual ministry efforts (this section).
- To acknowledge areas where there is conflict, disappointment, or insufficient effort.
- To clarify who did what and who depended on whom to do it.
- To celebrate the results of our efforts.
- To set the stage for establishing fresh goals for mutual ministry planning.
- To initiate new action.
- To deepen mutual commitment to our combined ministries.
- To better understand how we are working together, so that we strengthen our community.

The task is not to select from among these objectives, for they are interdependent. Rather, you should decide where to place your emphasis in this cycle and how you will articulate your intentions to the community. When you read the list, which objectives seemed immediately appropriate to your situation? Which ones would be the most engaging and appropriate for your congregation? How will you explain the purpose of mutual ministry review (and the whole mutual ministry cycle) to your community?



## PLAN THE REVIEW

After reflecting on your situation and objectives, you should be ready to select an appropriate review model. We will describe six models:

- A generic model for broad application with vestries
- First review with newly called leaders
- Custom design
- Whole-congregation design
- Seasons of Congregational Life: A Poetic View of Mutual Ministry Review
- Comprehensive Study of Ministry, Diocese of Maine

The descriptions are meant to guide you in planning your own unique process. Each situation includes slightly different components, and the ongoing review processes also allow for variations in how data is collected, how it is interpreted, and who is involved.

Eight basic steps are common to all the models.

1. Collect information.
2. Openly and honestly review what happened.
3. Seek to understand reasons things happened or did not happen.
4. Reflect on the relationships among people involved in ministry efforts.
5. Acknowledge success and failure.
6. Let go of the past and move on to the future.
7. Identify adjustments needed.
8. Celebrate the harvest.

## GENERIC MUTUAL MINISTRY REVIEW

This approach was used successfully in a parish of 150 active members for ten years. The meetings were held once per year when long-time vestry members were stepping aside and new vestry members were becoming familiar with their roles. (Steps from the basic eight described above are noted. Steps are not in numerical order, and some are repeated.)

9:00 Gathering (Step 4)

9:15 Morning Prayer, including Genesis 32:24–30 (Step 4)

9:30 Reflecting on Our Blessings

- Name three things we have done well this year. (Step 1)
- Looking at our vestry goals from last year, what have we accomplished? (Step 1)
- What are we doing better than expected? (Step 2)
- In what ways can we trace the movement of the Holy Spirit this past year in the congregation? In the vestry? (Step 3)

Read the list out loud and then sing the doxology. (Steps 5 and 8)

Praise God from whom all blessings flow.  
Praise him all creatures here below.  
Praise him above ye heavenly hosts.  
Praise Father, Son, and Holy Ghost. Amen

10:15 Reflecting on Things Left Undone

- Looking at the current goals, what has not been accomplished? (Step 1)
- What concerns you? (Step 2)
- What is the basis of your concern? (Step 3)
- In what ways has the congregation blocked the work of the Holy Spirit this past year? (Step 3)
- In what ways has the vestry blocked the work of the Holy Spirit this past year? (Step 3)

Read the list aloud, and then together say the absolution. (Steps 5 and 6)

Almighty God have mercy on us, forgive us all our sins through our Lord Jesus Christ, strengthen us in all goodness, and by the power of the Holy Spirit, keep us in eternal life. Amen

11:15 Vestry Process

Recall the story of Jacob wrestling with the angel read from Genesis 32:24–30 at Morning Prayer.

- How has the group experience been like wrestling with God and with one another? (Step 4)
- How has it left its mark on you? What is that mark? (Step 4)
- What blessing do you seek before this current vestry disbands? (Step 5)

Off-going vestry members share with the group their thoughts about their experience with the vestry.

- What surprised you about your service on the vestry? (Step 2)
- What was fulfilling for you? (Step 2)
- What was missing for you? (Step 2)
- What charge would you give to the next vestry? (Step 7)

12:00 Eucharist or Lunch (Step 7)

### **Reflecting on the Generic Process**

After reviewing the above outline for a generic mutual ministry review process, ask yourself whether this meeting design meets your needs. The design would not work if

- you have just called new clergy;
- you have so many ministry leaders that they could not easily participate using this format;
- the vestry is not familiar with all the activities of the parish;
- trust among vestry members is not high enough for open expression of observations and feelings;
- you want or need input from the whole congregation.

## **NEW CALL: ESTABLISHING EXPECTATIONS**

What is different about a new call? When a new leader is called to a community, everyone involved is learning how to work together and what to expect from one another. During the call process, all parties (diocesan offices, bishop, staff, call committee, and vestry) are well served by agreeing to use the mutual ministry cycle as a plan for ministry when the new clergyperson is in place.

Fortunately, much of the background material needed to examine expectations will have been developed during the call process: church deployment office (CDO) profiles for both congregation and clergy, and initial letters of agreement between clergy and vestry. (If you did not create these documents, work with your facilitator to establish initial expectations.) Recently adopted vision and mission statements, parochial reports, and at least three years of budgets will also be useful.

After the call, follow these steps to get started.

1. Decide who will participate in affirming mutual commitment and expectations. Clergy and vestry, or clergy and a subgroup of the vestry, are appropriate for this first cycle. You may also want to include members of the call committee.
2. Collect all of the documents identified above.
3. Extract information from the profiles, and prepare a list of the goals identified for the congregation in the parish profile.
4. Prepare a list of the expectations and responsibilities established for the clergy in the position profile.
5. Revisit what the clergyperson expects of the congregation.
6. Discuss the interdependence of expectations identified in steps 4 and 5.
7. Commit to actions that will help fulfill your expectations.
8. Find out what help you need from each other to get the work done.
9. Decide when you will meet to review progress.

Then, after working together for a few months, move on to the first review.

## BUILDING ON EXPERIENCE AFTER A NEW CALL

With minor modifications, the generic process described above is ideal. It is easy to facilitate, takes very little time, and provides an overview of parish activity. Alternatively, you could meet just a few months after the clergyperson has arrived, using the following questions to guide your discussion:

- What has been fulfilling for you?
- What surprised you about your service on the vestry since our new clergy arrived?
- What has been missing for you?

- What adjustments would you make in our mutual commitments and goals?
- What feelings do you have about the process just used and about each other's participation in it?

## CUSTOM DESIGN

Once the basic review process has been established with the clergy and vestry, you can garner new and deeper information by creating a customized approach. There are nearly as many mutual ministry review approaches as there are congregations. The situation, objectives, congregation culture, skills of leaders, and time available are but a few of the variables that will affect your own, unique process.

Once you have decided on the objectives for your review, you will need to collect information and interpret it. You could hire an outside group to study the congregation and report its findings, but that approach provides little opportunity to talk with each other and generates little ownership of the results. In mutual ministry, the community reflects on its own activities and together makes sense of the information gathered. Because the people are both the source and the interpreters of data, they develop shared understanding, together acknowledge success and difficulties, and are directly involved in making adjustments for the future.

To build a customized approach, first consider collection and interpretation of information. Collection methods address four questions:

- What information will be collected?
- Who will collect the information?
- Who will provide the information?
- How will information be collected?

Interpretation requires decisions about two questions:

- Who will interpret the information?
- In what settings will data be interpreted?

### **What information will be collected?**

You will need objective historical documents to help reviewers understand the current context of activities. Such documents might include recent call-process material, current

vision statement, current mission statement, recent parochial reports, letters of agreement between vestry and clergy, and recent goal statements. These documents will not require much interpretation but are essential for understanding past intentions and plans.

Subjective information is also essential. Whether you use a formal survey, interviews, or group discussions (see “How will information be collected?” below), you will need to find out what ministry has happened, how it was done, and how people feel about both the activities and the way they were carried out.

### **Who will collect the information?**

Many individuals or groups could be involved in data collection. They might include vestry, clergy, program leaders, program committees, ad hoc review teams, or the whole congregation. Your choice depends a lot on your leadership style, the size of the community, the amount of time you want to invest, and most importantly, your objectives.

A relatively quick review can be conducted by just the vestry and clergy. This approach will build a strong, mutually supportive leadership team. If your objective is to broaden leadership and involvement, however, then you will need to involve program leaders or committees. If you intend to establish ministry among all members of the congregation, the whole community should participate in information gathering and interpretation. As you involve more people in data collection, you will require a more highly skilled facilitator and more time. However, the depth and practice of baptismal ministry will also increase.

### **Who will provide the information?**

The easiest way to decide who will provide information is to consider who has the information you seek. If you are focusing on ministry program activities, you can safely involve only the vestry and program leaders. They should be sufficiently aware of activities to offer reliable information. On the other hand, you might want to ask the ministry beneficiaries about their observations and experience. Because mutual ministry seeks to help all community members fulfill their baptismal promises, asking for input from a broader group is important.

### **How will information be collected?**

The easiest way to gather information from a vestry is to use members' personal observations. But because they are not immersed in all aspects of the ministry, their views are naturally limited. More information can be obtained through personal interviews with a sample of the congregation or with all members. Written surveys or questionnaires can also be used. They allow many people to respond but tend to reduce input to what people like and dislike. A good process for gathering information establishes trust by teaching people to give and receive feedback appropriately.

### **Who will interpret the information?**

If annual planning is done solely by the wardens, they could receive collected information, interpret it, and then make plans for the future. This approach decreases the commitment of people who will carry out the plans, because they are not involved in the process. In a more likely scenario, the whole vestry and the clergy will together interpret the material. By doing so, these leaders will deepen their relationships and establish shared meaning of the information. If program leaders, committees, or the entire congregation are directly involved, they can create a common understanding of the past that provides a powerful platform for implementing new plans.

### **In what settings will data be interpreted?**

The simplest gathering for interpreting information is a half-day retreat involving the vestry and clergy. Such a meeting can be quick, simple, and relatively easy to schedule. It provides leaders an opportunity to check in with their thoughts and feelings about recent activities. More extensive meetings, such as a one- or two-day retreat, offer opportunity to reflect, resolve differing interpretations of data, enjoy personal renewal time, and celebrate accomplishments. A congregation-wide meeting helps gain perspective on the whole community. In such a meeting, members acknowledge and move beyond the past, understand the congregation's collective story, and weave generations of ministers together.

Customized mutual ministry reviews allow each congregation to understand what has happened and to interpret past events. The apostle Paul's letters to various Christian communities were tailored to their situation and needs. The epistles tell us much about the ministry in each particular place.

Just as studying the Pauline letters helps us understand our relationship with God and each other, mutual ministry review does the same, helping us understand our collective situation and to participate in our own unfolding story.

### WHOLE-CONGREGATION DESIGN

The following agenda has been used to involve the whole congregation at one time. An extended version was used with an entire diocese. Although it appears to be very different from the generic model, all of the basic features are present. For this process, information is recorded on large sheets of paper, small groups reflect and report to the whole community, and the entire assembly identifies preferences. This process takes a full day, including breaks, lunch, worship, and final celebration. Time spent on each activity can be adjusted to match the specific purpose of the meeting. Many facilitators are familiar with designing large and dynamic meetings. Leadership pioneer Marvin Weisbord's *Discovering Common Ground* and large-system change pioneer Richard Axelrod's *Terms of Engagement* provide additional detail.

#### **Welcome and Orientation**

Participants potentially include all members of the parish, lay and ordained, elders and youth. It is even valuable to invite members of the surrounding geographic community, especially people who have lived near the church for extended periods.

#### **Morning Prayer**

*Book of Common Prayer*, page 37, 75, or 137, or any other form of this office.

#### **Historical View of the Parish**

(about 90 minutes)

On large (3' x 6') sheets of paper (office supply stores have rolls), each participant records significant events from the past two or three decades, as indicated on the time line. The result is a composite time line of parish life up to the present. It might include, for example, the arrival and departure of various leaders, financial ups and downs, establishment of a new education program, or the agreement to build a new building. A second and separate time line is created on new paper for significant events in the lives of the individual



participants. This chart might include years when people joined the parish, births and deaths, discovery of individual callings, and other significant events. Next participants meet in small groups to reflect on the time lines and understand the stories they contain.

**Reflecting on the Immediate Past**  
(about 60 minutes)

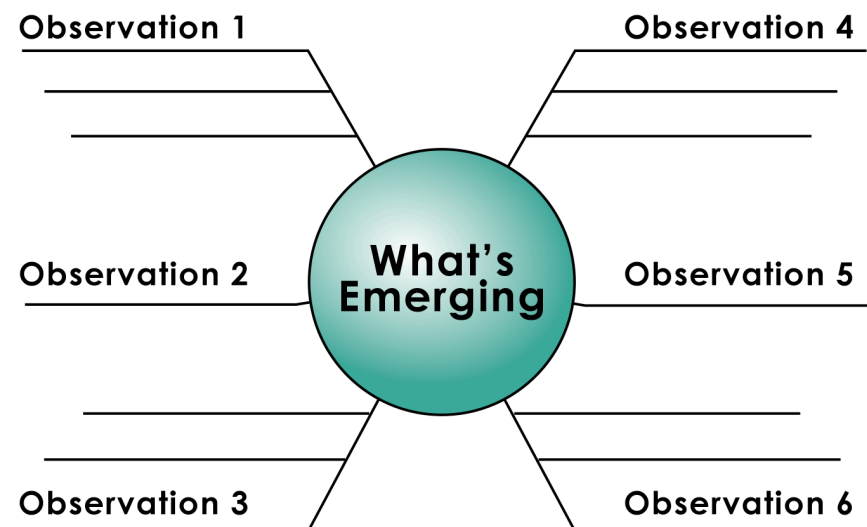
Now that the long-term history has been considered, participants review the past year. Small groups talk about what happened in the parish during the past year, what caused it to happen, and what the implications are for the future. Each small group shares its thoughts.

**What to Retain from the Past**  
(about 45 minutes)

Then the small groups reflect on things from the past that they want to continue, such as strong education programs, and things they believe should be acknowledged and released. Each group shares its reflections with the whole gathering.

**Emerging Issues and Opportunities**  
(about 90 minutes)

On a large sheet of paper (8' x 8') taped to a wall, create a "mind map" of the emerging issues and opportunities facing the parish community.



Start from a circle in the center labeled “What’s Emerging” and draw lines out from it, each one identifying an issue or opportunity. Use one color for issues, one for opportunities. Draw branches to add detail to any line. The chart will look something like the one above.

Next, ask each participant to mark the chart by sticking colored dots on the issues and opportunities they believe are most important for the future. In an open forum, the whole group then reflects on the significance of this map.

### **Moving from Past to Future** (about 120 minutes)

Based on what has been learned about the past and the emerging world, small groups now identify future ministry activities that further the mission. Group members are encouraged to think about ministries that have never been tried in this congregation and that address emerging opportunities. Groups report their thoughts. The ideas are collated into one list on flip charts, and the participants vote on their preferences by applying colored dots. Often, each participant is given three dots. This provides a quick understanding of priorities that will harness the enthusiasm of the community.

### **Celebration of the Future**

It may seem odd to celebrate something that has not yet happened, and yet we do that at every Eucharist. In that liturgy, we are so sure that Christ will come again that we celebrate the future as if it has already happened. When we declare and rejoice in our future, we initiate our movement toward it. Christ has died! Christ is risen! Christ will come again! So it is with our individual lives and the life of our congregations. Include some kind of celebration at the end of the large meeting, perhaps the Eucharist.

## SEASONS OF CONGREGATIONAL LIFE: A POETIC VIEW OF MMR

Both the vineyard often referred to in Scripture and our own lives follow patterns analogous to the seasons of the year. We can expect certain things to happen, and each one suggests certain topics for review. Based on these observations of the natural world, consider adding to your mutual ministry review a reflection about where your congregation is in its own life cycle. These images may also help a congregation move from a maintenance orientation to a focus on mission.

In the birth or rebirth of a community, as in springtime, we ask what needs to emerge, and we protect the new growth. We seek clear and decisive direction and simple action. This is probably not a time to build a cathedral, but that could be the long-term vision. This season is characterized by quick, short-term action, so review will need to address completing tasks and maintaining focus. It is also important to monitor resources, so that growth occurs at a sustainable rate.

In the fullness of growth, as in summer, questions arise about tending what is already in motion. We balance growth with available resources and enjoy the bright outward expansion of life. This is a time of great joy and productivity. Wonderful partnerships are visible among community members, and communication is easy, just as the disciples experienced at Pentecost. Review may not even occur here, except to check in on current accomplishments, because the work is so clear and enjoyable. A perfect image of this season is provided by George Gershwin in his opera *Porgy and Bess*: “Living is easy, and the cotton is high.”

If programs are bearing fruit, as happens toward the end of summer, review questions focus on lessons learned, storing up what is good, savoring the sweetness of results, and making sure the harvest is in before anything rots. This season is often missed in our culture, because we are so busy rushing on to new projects. Stopping to give thanks for the abundance of life—indeed, even noticing the abundance—nourishes the entire community. The Appreciative Inquiry process from the Diocese of Maine (see the end of this section) is appropriate for this season.

When a community or a ministry is ending a life cycle, as in autumn, it needs to fall back to its core, just as a tree lets go of its leaves. Review questions might address the essence of the community and explore what might be pruned to protect the core. Sometimes the continued existence of the community must be considered. Review in this phase honors what has occurred and acknowledges that some things will not continue. Participants will grieve for what is to be set aside or will not be accomplished.

In the fallow time, as in winter, we ask questions about remaining resources, sources of encouragement, the unknown, and things we do not understand. We seek courage

and look deeply and quietly into our identity. We are careful not to expend energy on trifles. Most of all, this season reminds us that rest is essential for life and that the quiet “being” of our community is as important as the busy “doing” of the other seasons.

As you plan the questions and processes for your reviews, take a moment to reflect on what is happening around you. The resulting awareness will guide you to the most useful questions. Also remember that the overarching purpose of mutual ministry review is to build up the body, just as the farmer builds up the vineyard. Jesus said, “I have come that they might have life, and have it abundantly” (John 10:10). Design your review activities so they contribute to the abundant life of your community and each individual in it.

## COMPREHENSIVE STUDY OF MINISTRY, DIOCESE OF MAINE

Communities that engage in mutual ministry review over many years find that it shapes their understanding of ministry itself. This is especially so when the process used constantly identifies what is currently working and what might work in the future. It becomes an appreciative process that affirms the community spirit and calls forth the best from everyone involved. The Diocese of New Hampshire and the then Rev. Canon Gene Robinson contributed material that is the foundation for this work. The Diocese of Maine, under the guidance of the Rev. Canon Linton H. Studdiford, put the process in a framework of Appreciative Inquiry. The Diocese of Maine’s process is included here with minor modifications to fit this guide.

### Philosophy

For just as the body is one and has many members, and all the members of the body, though many, are one body, so it is with Christ. For in the one Spirit we were all baptized into one body—Jews or Greeks, slaves or free—and we were all made to drink of one spirit.

—1 Corinthians 12:12–13

The church is . . . the Body of which Jesus Christ is the Head and of which all baptized persons are members.

—“An Outline of Faith,” *Book of Common Prayer*, p. 854

For years, the Diocese of Maine has encouraged all congregations to conduct an annual mutual ministry review. More of-

ten than not, this process has been regarded by both the rector and the vestry as an onerous task that, if done at all, should be done with haste, perhaps using some convenient checklist. Although the words “mutual” and “ministry” come first, the word that stands out for people is “review.” Rather than seeing mutual ministry review as a time for positive dialogue between lay and clergy leaders about their work in both congregation and community, clergy and lay leaders have often regarded it as the time to tell the priest all the things that have gone wrong in the past year. For these reasons, we call the process that will be presented below a “mutual study of ministry.” Mutual study of ministry (MSM) is an opportunity for reflecting on and examining the ministry of the whole community. This new name fits the spirit of the process better than “review” or “assessment” does.

Two central and interrelated building blocks undergird the MSM process. The primary building block is the vision of the church as a baptismal community, as outlined above in the quotes from Paul’s First Letter to the Corinthians and in the catechism from the *Book of Common Prayer*. MSM understands the church as a community inspired by the Holy Spirit and gathered around the font and the altar. Through baptism, every Christian enters into the life, death, and resurrection of Jesus Christ and is empowered to continue Christ’s work of reconciliation in the world. Mutual study of ministry is first an inquiry into how we as individuals and a community can best live into the baptismal covenant.

The second building block basic to MSM is the Appreciative Inquiry process. David Cooperrider, a pioneer in Appreciative Inquiry, explains that the process is based on a reverence for life. Participants identify the factors that give life to their system and then try to articulate possibilities that can lead to a better future. Appreciative Inquiry understands the church as an organic community (the body of Christ) in which the whole is greater than the sum of its parts, and indeed, the parts are defined by the whole. It does not regard the church and its leaders as problems to be solved by looking at what is wrong or broken. Rather, it seeks and affirms what is working and asks how we can strengthen what is being done well. Appreciative Inquiry looks at what gives life to the congregation and asks how that can be affirmed and carried into the future. It asks: “In light of the baptismal covenant, where is God calling us as a community?”

Mutual study of ministry applies to everyone in the congregation. When it occurs early in the tenure of a priest, it offers an opportunity for the vestry, clergy, and congregation to review how they see this new joint ministry and to reexamine their assumptions and goals. For all clergy, newly called or settled, it is an occasion to reexamine their own roles and working relationships and to join in mutual feedback to make the whole ministry truly mutual. For the vestry and lay leaders, it is a time to consider their roles in creating the kind of parish community they want, reflect on their expectations and the current realities of ministry, and give and receive feedback. It is also an opportunity for the whole community to speak the truth with love, so that differences between expectations and realities can be shared, and honest dialogue about the future can take place. MSM is an opportunity for clergy, vestry, and congregation to reflect together about how effective and responsive they are in carrying out their baptismal ministry.

All of God's people struggle at some point with the question of whether or not we are really being faithful to God's call and to our baptismal covenant. But without taking the time to ask "Where are we going? And how can we best get there?" opportunities to live out our faith are lost. If we acknowledge that all Christians—clergy and laity alike—share in developing God's ministry, then this time to reflect and make decisions will not only be viewed as appropriate, but will be welcomed.

### **Process**

The process is straightforward and is intended to involve clergy and lay leaders as well as a significant percentage of the congregation at large. MSM begins with the vestry and clergy, led by a facilitator, selecting three or four questions concerning the ministry of the congregation. This group will then pick a cross-section of 20 to 30 people from the congregation to be interviewed. Each vestry member and clergy person will then conduct face-to-face interviews with two or three people from this list, using the agreed-upon questions. The responses are written down and then collated into a narrative that is shared at a final meeting of the facilitator, clergy, and vestry. During this meeting, goals, strategies, and next steps for the year are formulated based on the congregational responses. These results should be shared with the congregation as a whole and can be used as a basis for the next MSM.

### **Step 1: Preparation**

(two hours)

Facilitator helps rector and vestry to

- learn about the philosophy of MSM
- examine an overview of the MSM process
- identify areas of growth, challenge, and strength
- identify questions for interviews, such as:
  - What is working well?
  - What are our strengths?
  - Do we need to make changes in our stated goals?
  - Are our goals consistent with where God is calling us to be?
  - Are our expectations fair and realistic, a stretch for us but not impossible?

### **Step 2: Interviews**

(two to four weeks)

How long it will take to conduct the interviews will depend on the time of year and what else is going on in the parish and members' personal lives. The vestry and rector arrange and conduct interviews by an agreed-upon deadline, using the following process.

- Choose cross-section of parishioners to be interviewed.
- Assign two to three interviewees to rector and each vestry member.
- Conduct face-to-face interviews.
- Record responses during or immediately after interviews.

### **Step 3: Compilation**

(approximately two to three hours)

A subcommittee of two or three people, who may be from the vestry, compiles and collates the results. Results are mailed out or given to the rector and vestry at least three days before step 4 is to take place.

### **Step 4: Planning**

(two hours)

Facilitator meets with rector and vestry to share results and formulate goals, which should be

- limited in number (four maximum)
- specific (in task and in completion date)
- measurable (as much as possible)
- achievable

### **Step 5: Sharing**

This step should be conducted within two weeks after completion of step 4. Results are shared with the congregation through

- newsletter
- town meeting
- special parish meeting
- special mailing

### **Sample Questions for Step 1**

- How did we live out or put into action our mission statement (the Gospel) this past year?
- What was a highlight of our ministry this past year—with one another? in the community?
- What was the most positive activity in our congregation during the past year? Who was responsible for making it happen?
- Whom do you want to thank?
- What now needs the attention of the rector and vestry? What would you like to strengthen?
- What task or goal is most important for the coming year?
- How would you describe the quality of our congregational community life this past year?
- Last year, we set \_\_\_\_\_ as a goal. How did we do?
- What attracts newcomers to our congregation?
- What do you believe God is calling us to do in the next \_\_\_\_\_ years?
- What did you learn this year? How did you grow?



- What do you value most about \_\_\_\_\_ Church?
- Describe two or three ways to strengthen the ministry and health of \_\_\_\_\_ Church.
- Describe a moment or incident or encounter in the past year at \_\_\_\_\_ Church that was especially meaningful for you.
- Describe the one most important factor that, for you, gives “life” to \_\_\_\_\_ Church.
- If you had one wish for \_\_\_\_\_ Church for the next three to five years, what would it be?

## FINAL THOUGHTS ON REVIEW MODELS

In our desire to effectively review past activities, it is easy to focus on tasks, programs, or numbers, and to exclude a review of the relationships involved in exercising ministries. Everything done in a church—or business, for that matter—is done through some kind of relationship. As questions are prepared in any review model, be sure to include some that invite participants to reflect on the quality of relationships. Consider issues such as these:

- Who has been included in leadership conversations?
- How well do we listen to one another?
- Who does not seem to have a voice in the community?
- How are we handling day-to-day decision making?
- How are we sharing gifts, power, and time?

Attending to these issues as well as the programmatic ones can resolve concerns, build partnerships, and increase trust.

Many excellent review processes have been developed across the church, and they are as varied as the congregations themselves. These few models and design options serve as examples for dioceses and congregations that have not already adopted a model and for those that want to revise their existing one. You may select the parts that work for you. Living congregations change over time, and their mutual ministry processes need to evolve with them. If the work is done in love and with an intention to build up the body, all shall be well.



## Section 3

# MINISTRY REVIEW FOR INDIVIDUALS

## LIVING OUR BAPTISMAL PROMISES

I give thanks to my God always for you because of the grace of God that has been given you in Christ Jesus, for in every way you have been enriched in him, in speech and knowledge of every kind—just as the testimony of Christ has been strengthened among you—so that you are not lacking in any spiritual gift as you wait for the revealing of our Lord Jesus Christ.

—1 Corinthians 1:4–7

This section of the guide addresses how individual Christians might approach a review of their own ministry as part of a community effort to fully express our baptismal promises and calls. If we limit mutual ministry review to leaders and programs, then we might as well be any organization doing strategic planning. But we are not any organization. Our work is about supporting each other in community to live out the life God has given to us and to fulfill the promises of our baptism. We are called not just to maintain what we are doing, but to continually grow in our understanding of and capacity to pursue the mission of the church in its broadest sense. Consequently, reflecting on our individual ministries is a cornerstone of the mutual ministry cycle. Such reflection is well suited to congregation retreats, Lenten study programs, vestry gatherings, and clergy conferences.

St. Paul challenged the disciples whom he taught and nurtured to think of themselves as athletes in training for a great race. He admonished them to train persistently in their ministries, as a winning athlete does, that they might receive the great prize of imperishable wealth (1 Corinthians 9:24–27). Out of hearts thankful for the blessings of God, seeking to offer our best and hold ourselves accountable for the grace

that is in us, we strive for excellence in ministry. We begin where we are, aware that we stumble and fall and that God's merciful grace lifts us up, heals our wounds, and sets our feet on the Way over and over again. If we are open to God's grace, then we are open to learning and growth in the practice of ministry throughout our life journeys.

As we prepare for mutual ministry review, it is easy to limit our conversation to those who fill easily identifiable roles in the church. When we think of ministers, we historically included bishops, priests, and deacons. The catechism of the *Book of Common Prayer*, however, reminds us that “ministers” include lay people. It also suggests that the ministry to which we commit in baptism is the fundamental ministry. For congregations that are ready to extend mutual ministry review beyond programs and designated leaders, this section provides methods for reviewing the ministries of all baptized people.

Reviewing the ministries of lay people in the world requires that we include the work they do daily, beyond the church community. All baptized people are called to identify, with the help of the church, the gifts they have for ministry and to use them to build up the church and in service to the world. In her unpublished pamphlet “The Ministry of the Laity in Word and Sacrament,” Diocese of Massachusetts Mutual Ministry Committee member Jean Manners writes, “Baptism is not only incorporation into the Church, but also a sending forth into the world. Since Christ has a mission in the world, incorporation into his Body means that each member is called to share in that mission. Baptism, therefore, is both a call and a commissioning to ministry as representatives of Christ in the world.”<sup>1</sup> Christians are to sustain their ministries through a commitment to lifelong learning and growth in Christ.

At some points in the church's history, the notion of vocation has been especially applied to people who pursue life in various holy orders. Recently, however, career counselors and spiritual directors are seeing a renewed sense that vocation is about all people in their daily lives. To paraphrase theologian Frederick Buechner, vocation is the place where the heart's deep gladness meets the world's deep hunger.<sup>2</sup> Similarly, Larry Daloz—a program director at the Whidbey Institute in Clinton, Washington, and author of several books on mentoring and vocation—describes in the book *Common Fire* people who have wonderfully expressed their deeply held

purpose in the world through their work on behalf of others.<sup>3</sup> These perspectives help bridge the gap between a secular notion that we “have a job” and the Christian understanding that our lives are “ministry.”

We can deepen our understanding of our lives as ministry by reflecting on our baptism. The touchstone of ministry review is the baptismal covenant, whose questions fall into four groups. The first set of questions inquires about our belief in the Triune God. The second set asks those being baptized or renewing their vows whether they intend to be faithful participants in Christ's body, the church. The next question reminds us of our fallibility and the need to continually return to the One whose Way we follow. The last set addresses a Christian's life in relation to the world beyond the church. These questions are the appropriate starting point for an individual ministry review. The approaches described below expand on this foundation.

## APPROACHES FOR INDIVIDUAL REVIEW

As with mutual ministry review described in section 2, we can reflect on our individual ministries in several ways. All of them draw on the baptismal covenant.

### **Model 1: Reflection on Our Baptismal Vows**

John Westerhoff and Caroline Hughes provide ideas for reflection in “Baptismal Covenant,” in *Ministry in Daily Life*,<sup>4</sup> as outlined here. Privately, and especially in a parish gathering, they encourage Christians to reflect on their baptismal vows and consider the following:

- What does this promise mean to you?
- How might your keeping this promise gradually change your life?
- In what specific ways would you like to keep this promise in the next six to twelve months?
- What help will you need in living out this promise? Where might such help be available?

### **Model 2: The 24-Hour Inventory**

J. Fletcher Lowe, Jr., whose baptismal ministry is working for social justice in Virginia on behalf of the faith community, has developed a 24-hour inventory for individual min-

istry review. He highlights the reality of ministry being done in the workday settings of life. Our understanding of ministry becomes especially rich when we adopt Buechner's view of vocation. We can examine the fullness of our vocation using the following process. On what you think will be a typical day, take a few moments each hour to write a note about what you have been doing. For example, if you work in a professional setting, you would jot down professional work activities, informal interactions at lunch, and evening projects with your family. After the 24-hour inventory is completed, reflect on these questions:

- On whose behalf do you do these things? Why?
- What factors shaped this day?
- Who offered you help during the day? What help did you receive?
- Who ministered to you?
- What activities or way of working during your day was ministry?
- Where was your ministry most evident during your day?
- In light of these events, what might you do to more fully realize, extend, or live into your ministry?
- How might you summarize the core purpose of your vocation in the world?

### **Model 3: Six Arenas of Daily Life**

In his book *When the Members Are the Missionaries*, Christian educator and writer Wayne Schwab focuses on the baptized person's role in Christian mission—"mission" defined as God's action in the world to bring about God's reign. Schwab refers to the work of Mark Gibbs, a leader in the missions field. Gibbs outlines "five arenas of daily life as mission fields" and adds a sixth field, the church, to the list. These are listed below with a brief indication of what activities might be included in each.<sup>5</sup>

- Home: parenting, nurturing friendships and relationships among those who live in the place one calls home
- Work: carrying out whatever one is paid to do, working to sustain a household; for students, completing schoolwork; for retired people, volunteering

- Local community: serving as a school board member, sports coach, scout leader
- Wider world: writing letters to the editor about world affairs, participating in an environmental organization, voting, giving to charities
- Leisure: pursuing a hobby or recreation, caring for one's physical or psychological well-being
- Church: reading scripture at worship, visiting the sick, volunteering at the food pantry, serving as a designated leader in the congregation

Schwab poses seven questions to connect the stuff of daily life with each of these mission fields.<sup>6</sup>

1. What has God been telling me or doing through my life in this mission field?
2. What conditions inhibit reconciliation, justice, and love in this mission field?
3. What change is needed to increase reconciliation, justice, and love in this mission field?
4. What will I do to achieve this change, considering my gifts, limitations, and convictions?
5. What vision will I use to draw others into working with me for this change?
6. How will I talk of God while I am sharing my vision?
7. How will I invite others to join me at Jesus' table to be fed and empowered to achieve this vision?

#### **Model 4: Growing in Competency in Christian Practices**

A series of essays in the book *Practicing Our Faith*, edited by Dorothy Bass, director of the Valparaiso University Project on the Education and Formation of People of Faith, address those who yearn for a deeper understanding of what it means to live as Christians in a time of profound change. The editor draws on the concept of “practices,” because, as she says, “Practices are those shared activities that address fundamental human needs and that, woven together, form a way of life.”<sup>7</sup> They are important not only because they result in valued outcomes, but because earnestly taking part in them is worthwhile and good in itself and, when the prac-

tices are done well, can change how we live each day. The practices help connect our jobs and roles, whatever they are, to our Christian ministries.

- Honoring the body. Our bodies are made in the image of God, the place where the divine presence dwells.
- Hospitality. The human need for shelter is fundamental, and there is a biblical imperative to welcome the stranger.
- Household economics. Decisions we make about our family livelihood and well-being have implications far beyond our own homes.
- Saying yes and no. Christianity is not a spectator activity. Saying yes and no means taking on responsibilities and obligations and making difficult choices.
- Keeping Sabbath. This practice involves participating in the holiness of God and is also a matter of social justice.
- Testimony. We step forward and give an account of what God is doing in our lives.
- Discernment. A person or community seeks out and takes part in God's work in specific situations.
- Shaping communities. We strive to be reliable as individuals and organizations.
- Forgiveness. We restore relationships by doing things with and for others.
- Healing. We embody God's healing presence to others.
- Dying well. In death, as in all the passages of human life, we belong to God, and the community around us mediates God's presence.
- Singing our lives. Music arises naturally when life is deeply felt or recognized.

These practices can be used as a guide for private journal writing, for discussions with a prayer partner, or for study group conversations. Reflect on each one in order to examine how you are living your Christian life.

## USING THE MODELS

The above four models can be used in a variety of settings. They can be used for private reflection and then in a community conversation, where we gain support and clarity



about our responses. Ministry always happens in relationships with others, our communities.

- For individual exploration  
Examining our Christian lives is an exciting adventure filled with opportunity for discovery and growth. Self-examination can also be confusing and challenging. Consequently, individuals entering individual ministry review will find it helpful to obtain a confidential companion, spiritual director, or study community. The partner provides the safety and company of a fellow adventurer. The director provides the service of a person trained in the art of spiritual discovery. And the community provides companionship and a context in which we work with other people rather than alone.
- As part of a congregation's ministry review  
Each of the models is suitable for mutual ministry review efforts in the whole community and will help ground those activities in the congregation's mission. Lowe's 24-hour inventory, for example, could be used by inviting participants to record the activities for one day of the week prior to a parish retreat and then, at the retreat, to reflect in small groups. This process could lead to both deeper understanding of individual ministries and enriched relationships among participants. Another approach is to use one of the models at the beginning of a vestry/clergy MMR meeting.

Regardless of the model selected, it is appropriate for all ministers to reflect on the ways we have been faithful to God's call. These reflections help set a tone of mutuality before proceeding to other aspects of MMR. The combined results of individual reviews can be used to adjust parish programs, so the programs better equip us to be ministers in both the church and the world.

### Notes

1. Quoted in *The People of God in the World: A Handbook for Congregations in Mutual Ministry* (Boston: Diocese of Massachusetts, Undated), p. 39.

2. Frederick Buechner, *Listening to Your Life: Daily Meditations with Frederick Buechner* (San Francisco: Harper San Francisco, 1992), p. 185.
3. Laurent A. Parks Daloz et al., *Common Fire: Leading Lives of Commitment in a Complex World* (Boston: Beacon Press, 1997).
4. John Westerhoff and Caroline Hughes, "Baptismal Covenant," in *Ministry in Daily Life: A Guide to Living the Baptismal Covenant* (New York: The Episcopal Church; Chicago: The Evangelical Lutheran Church in America; and ecumenical colleagues in The Coalition for Ministry in Daily Life, 1996).
5. A. Wayne Schwab, *When the Members Are the Missionaries: An Extraordinary Calling for Ordinary People* (New York: Member Mission Press, 2002), pp. 5-6.
6. Ibid., pp. 10-11.
7. Dorothy C. Bass, ed., *Practicing Our Faith: A Way of Life for a Searching People* (San Francisco: Jossey-Bass Publishers, 1997), xi. Section 4

## Section 4

# MINISTRY REVIEW FOR DESIGNATED LEADERS

## LIVING INTO LEADERSHIP

For as in one body we have many members, and not all the members have the same functions, so we, who are many, are one body in Christ, and individually we are members one of another. We have gifts that differ according to the grace given to us: prophecy, in proportion to faith; ministry, in ministering; the teacher, in teaching; the exhorter, in exhortation; the giver, in generosity; the leader, in diligence; the compassionate, in cheerfulness.

—Romans 12:4–9

When mutual ministry is well established, everyone who participates is involved in adjusting priorities, relationships, and processes, so that the mission of the church can be pursued. The “one body” is organized and living. Within that body, as Romans 12:4–9 illustrates, “members” have gifts “according to the grace given to us.” Mutual ministry review also includes reflection about people in specialized roles—we are calling them *designated leaders*. The senior warden, education coordinator, music director, youth leader, and rector, to name a few, have been called to specific roles that over time bear the imprint of their personalities, efforts, and gifts. A congregation’s reflective work on mutual ministry would be incomplete without consideration of the work of these individuals. This section describes some of the difficulties and opportunities presented by individual reviews and considers individual leaders’ vocational cycles and simple processes for conducting reviews.

Church leaders often carry attitudes from the secular world, attitudes that present both opportunity and danger. The opportunity is that a great deal of time has been devoted to understanding how to review individuals' work in secular settings. The danger is that most performance review processes are not implemented well. The mere mention of an annual review sets many leaders and leadership teams on edge.

When the practice of annual reviews began in industry in about 1920, the person conducting the reviews was able to observe firsthand a worker's activities.<sup>1</sup> Feedback on technique, attentiveness to the job, rate of work, and safety was based on clear criteria and timely observation of the worker. Or so the myth goes. Reviews of individuals' performance have rarely been perfect, however, and few people view either giving or receiving performance-related feedback as an enjoyable or productive process. Total quality guru Edwards Deming went so far as to say to industrial leaders, "Don't do it." In the church, there are many examples of clergy evaluations run amok. Relationships have been broken, communities undone, and ministries paralyzed by ineffective performance reviews.

Why are reviews so difficult? Performance evaluations assume that when given feedback, the person being evaluated can make positive changes in his or her actions. This assumption in turn assumes (1) the person can control the area of work being evaluated, and (2) the evaluator can see and make an accurate assessment of what needs to change. However, unless the person conducting performance reviews has intimate knowledge of how the work really gets done as well as what is possible through improved work methods, the feedback is neither corrective nor motivating. Such a process tends to objectify the person being evaluated and is vastly different from mutual ministry review, in which we all look at our work together.

Ministry, as opposed to idealized industrial work, is messy business. People often provide feedback to ministers about things the minister does not control. There will always be a tension between the community's desire to obtain the services it wants and the leader's limited ability to control events. Moreover, the feedback given to church leaders is often based on individual reviewers' opinions and unstated preferences, rather than carefully collected information about events and the leader's role in them. We are left in a

conundrum, because the community that calls the leader has a legitimate interest in establishing expectations, reflecting on the work she or he has done, and working with the person to adjust priorities or style of working. But the processes used often create more problems than they solve. How can we resolve these problems in a manner consistent with the objectives of mutual ministry?

## BEFORE BEGINNING

Given the nature of the mutual ministry cycle and the objectives of mutual ministry review, several things need to be in place before any designated leader's ministry is reviewed.

1. A solid mutual ministry program needs to be underway.

As described in the introduction, ministry is by nature a highly relational activity. If the whole vestry, for example, is not engaged in reflecting on the whole of their mutual ministry, the vestry must not undertake review of individual leaders.

2. Common understanding of each leader's role and the community's expectations of leaders must be established.

Expectations should be established for the leader six to twelve months before the review begins. Letters of mutual understanding and commitment often provide initial frameworks.

3. A prayerfully developed, trusting relationship among people participating in the review must be present.

When conflict is high and trust is low, constructive reviews are impossible. If the congregation is experiencing low trust, leaders must get help resolving the conflict and wait at least six months before starting a review of designated leaders' work. In one congregation, a long-time and powerful member of a congregation announced to the vicar that he was "the worst vicar they had ever had" and then demanded that a review be conducted. This is not the way to start giving feedback, and it is unlikely that a truthful and productive review could be conducted in such a situation. If a congregation is involved in an even more serious crisis, such as misconduct by any official leader, the appropriate diocesan staff should be called on to address the issue. This is not the time for a ministry review.

4. A well-trained outside facilitator is essential.

Unless a congregation has exceptionally high trust and easy flow of ideas—including useful expression of disagreements—an outside facilitator must be used. It must be clear, however, that the facilitator is not an evaluator, and unless expressly hired to evaluate, the facilitator should not make recommendations.

### MINIMIZING DIFFICULTIES

Even though the review of ministries poses difficulties, the problems can be mitigated by involving leaders in the reflections. Most problems occur because reviewers act as if they really understand the leaders' work.

1. Include *all* designated leaders (paid and volunteer) in the review.

All too often, only the clergy are considered. Yet in even a small pastor- or family-centered church, there are other leaders. These include, for example, the senior warden, the junior warden, the music leader, and the education leader.

2. Remember that evaluation of ministry is largely subjective.

Take time to understand what each designated leader really can control and what he or she can only influence.

3. Begin the process with the leader's self-reflection.

Good leaders are self-reflective and continually seek to develop. The individual should be expected to reflect on his or her own work and to share those observations with someone responsible for the leadership reviews, such as the senior warden. A simple process like the 24-hour inventory in section 3 could be used by a person who has little experience with self-reflection.

4. Be specific.

Nothing is more disempowering than generalized criticism. Determine in advance what is to be reviewed and how observations will be collected. In the above example of the powerful congregation member who proclaimed the vicar "the worst," the parishioner had not participated in setting up expectations, was not specific about how the vicar had

failed to meet them, and did not participate in gathering others' opinions before announcing his own "review."

5. Conduct the review in an appropriate setting.

Most reviews should occur in private settings, such as an office or home. If this process is new to your congregation, limit initial participation to two or three people. If the community and the leader are highly skilled in their ability to give and receive feedback, the reflection can occur involve more people.

## A REVIEW PROCESS

At its best, review of individual leaders provides an opportunity to assist them in their ongoing development. Many leaders, however, rightfully fear ministry reviews, because the processes tend to be occasions for criticism, even condemnation, rather than well-designed conversations for development. When expectations are clear and honest feedback is provided on a regular basis, many opportunities for growth can be identified, and problems or misunderstanding can be avoided.

Once the timing is right and the resources are in place for a productive reflection on designated leaders' work, the process for the conversation can be simple. The following approach includes

- reflection for individual leaders;
- self-reflection before a group leadership review meeting;
- a meeting with all designated leaders.

### **Reflection for Individual Leaders**

1. Recall a situation in which you were particularly pleased with something you did or said.
  - a. What was it about your actions, knowledge, or attitudes that stand out for you and contributed positively to this situation?
  - b. Why were those things important to you?
2. Now think of a situation in which you did something that did not turn out well.

- a. What did you expect?
  - b. How was that different from what happened?
  - c. What might possibly be done to make adjustments?
3. In what ways could you grow in your ministry?
  4. What else is on your heart about your leadership?

### **Self-reflection before Group Leadership Review Meeting**

Before initiating a meeting of all designated leaders, ask each individual leader to reflect privately. Each leader should ask himself or herself these questions:

1. What has been the mission of this ministry?
2. How is it intended to further the mission of the church?
3. What specific goals were established for the year?
4. What were highlights of your leadership in this context?
5. What surprised you about the results?
6. What would you do differently in the future?

### **A Meeting with All Designated Leaders**

Following time for personal preparation, members of a leadership group such as the vestry share their individual responses, and each individual receives feedback from the group. Begin with a single leader sharing his or her personal reflection. Then ask the other leaders to provide feedback in these three areas:

- some things to do less of
- some things to keep the same
- some things to do more of

Then rotate the conversation to another leader until all have shared their personal reflection and received feedback. Finally, provide some time for individuals to digest what they have just heard. Each individual then prepares a response and an action plan for the next period.



## SUMMARY

The tension between the need for reflection and the difficulties involved in actually conducting designated leader reviews can be resolved through adequate preparation, individual reflection, mutual review, expectations that fit the situation, and use of coaches and facilitators. Making reflection a normal part of leaders' work helps avoid problems and crises. As with all aspects of mutual ministry, we encourage you to keep reviews simple at first and build trust during the process. The appendix contains additional resources for detailed individual reflection and feedback.

## Notes

1. William F. Glueck, *Personnel: A Diagnostic Approach* (Dallas: Business Publications, Inc., 1974).



## Section 5

# FACILITATOR'S GUIDE

By the tender mercy of our God,  
the dawn from on high will break upon us,  
to give light to those who sit in darkness and in the  
shadow of death,  
to guide our feet into the way of peace.

—*Luke 1:78–79*

This guide recommends using an outside facilitator for both the planning and review phases of the mutual ministry cycle. By definition, mutual ministry involves two or more people. Consequently, human-relations dynamics will influence the way work is done, who gets heard, and the product of the effort. This section offers a few basic reminders about working with groups. It is not the authors' intention to provide a complete course on group facilitation, and they urge all congregations to obtain qualified facilitators from their diocesan resource office or some other source, such as the Organization Development Network. Many facilitators volunteer time to work with congregations. For large projects, such as program planning in a corporate-size church, professional facilitators may charge for their services.

## FACILITATOR SELECTION AND TRAINING

Trained facilitators are key to successful mutual ministry review. Good facilitation involves much more than running smooth meetings. Many dioceses have training programs to prepare facilitators for this type of work.

The facilitator must be skilled in several areas.

- Meeting design
  - establishing the purpose of each meeting
  - planning the meeting based on an accurate assessment of the situation.
  - planning conversations that are consistent with the purpose
  - planning based on the size and skill level of the group
- Group dynamics
  - understanding and working with issues of inclusion, control, and openness
  - observing and working with the ebb and flow of emotion, energy, and attention during meetings
  - helping a group learn these dynamics
- Trust and safety
  - creating a climate of understanding
  - fostering a flow of ideas that allows people to speak for themselves without attributing thoughts or feelings to others
  - using “I” statements to maintain personal accountability for emotions and thoughts
  - acknowledging agreement and disagreement
  - bringing hidden issues into the conversation so that the most important work is being done
  - intervening when attacks or blame emerge while at the same time talking about very real issues
- Personal awareness
  - being conscious of one’s own reactions
  - keeping the client’s needs ahead of personal agendas
  - establishing good boundaries to manage one’s own emotions and thoughts

- being willing to adapt approaches as warranted
- Conflict interventions
  - understanding levels of conflict and how to work with them
  - knowing when there is too much conflict to conduct mutual ministry reviews
- Feedback
  - constructing feedback conversations that build capacity rather than exacting blame
- Mutual ministry review
  - knowing how mutual ministry review differs from industrial performance evaluation or strategic planning

## CONTRACTING BETWEEN FACILITATOR AND CONGREGATION

Consulting expert Peter Block explains, in his book *Flawless Consulting*,<sup>1</sup> that the first task of the facilitator is to establish a contract with the organization, stating the purpose and scope of the work, the methods of working, time requirements, compensation (if appropriate), and the responsibilities of the facilitator and organization members. Sometimes it is necessary for the facilitator to spend time understanding the congregation before a full contract can be established. In that case, the preliminary agreement will indicate that a final plan will be established after initial observations are complete.

A simple example will help illustrate the importance of appropriate contracting. A congregation's senior warden called a facilitator to conduct a mutual ministry review. The request was for a half-day meeting. The facilitator learned that there was no plan in place, there were disagreements about the role of the rector, and the rector was not enthusiastic about participating in an "evaluation." Had the facilitator contracted for a "simple" half-day meeting, the results would have been awful. The contract needed to include educating participants about mutual ministry, gathering data, resolving conflict among vestry members, and establishing mutual expectations. What the senior warden really wanted initially was someone to coax the rector into establishing mutual expectations.

According to Block, the facilitator and the organization must share (1) equal degrees of commitment to the goals, (2) investment of effort and resources, and (3) responsibility for getting the work done. Often, facilitators are expected to do the review and take responsibility for the success of a review meeting while the congregation leaders effectively abrogate their responsibilities. A better arrangement is for the facilitator and leaders to establish roles and expectations and articulate them in the contract. The contracting process can actually help establish the mutuality called for in mutual ministry.

### **Contracting**

Block suggests a number of basics to consider in contracting.

- Mutual consent . Both parties must freely choose to enter the agreement and have the authority to end it.
- Valid consideration. Both parties must benefit in known ways (there are often unknown benefits as well). The contract is stronger when both parties state explicitly how they expect to benefit from entering the contract.
- Authentic behavior. Awareness of one's own accumulated wisdom, skills, and perspective provides a basis for a facilitator's authenticity. If the work does not allow the facilitator to be herself, she cannot do a good job. If the facilitator has any reason to avoid being authentic (a prior relationship that creates a conflict of interest or confusion about roles), a good contract cannot be established. Likewise, if the facilitator does not believe the leaders are behaving authentically, she might well refuse the work.
- Written agreement. The business of contracting has to be completed in writing.

The facilitator needs to

- know who the client is.  
If a senior warden does the official contracting, he might be seen as the client. But in mutual ministry review, the rector and the entire vestry are inseparable from the work. They also need to enter into the agreement as clients.
- elicit the client's expectations.  
"Run the meeting" is not enough. What is expected of the facilitator before, during, and after the meeting? With whom does she interact?
- clearly, simply explain what he or she wants in return for the work.

- say no or postpone if he or she thinks chances of success are slim.

If the facilitator discovers substantial conflict, the mutual ministry work should be postponed. If she learns there is no commitment among the vestry members for mutual ministry, the facilitator should say no to a review meeting.

- probe to understand the clients' concerns.  
A client who is not willing to share concerns about the project, the contract, or the situation in the congregation is not likely to participate fully in a ministry review.
- discuss openly when the work is not going well.  
The facilitator and client must be able to discuss what is happening. If the project begins to break down, the cause could be the facilitator's lack of skill or resistance from the congregation.

Besides just getting the work done, both clients and facilitators typically want intangible conditions and results as well. Clients usually want to

- be treated with respect;
- receive honest feedback;
- work with a facilitator who is not anxious;
- be valued as a person exactly where he or she is;
- have issues treated with confidentiality.

Facilitators typically want to

- be treated with respect;
- have phone calls returned;
- be met on time;
- have the work taken seriously and for the client to be fully engaged.

Desires or clients that do *not* work include

- guarantee of a perfect meeting in which everyone is happy;
- guarantee that everything in the review will be positive;
- guarantee of full participation by the whole congregation;
- immediate results;
- increase in enthusiasm for mutual ministry review.

### **Matching Client and Facilitator**

Finally, good contracting takes into account the basic match between facilitator and client. Even with excellent skill, not every facilitator is a good match for all congregations.

- **Fit.** Does the style and approach of the facilitator fit the congregation? A very informal facilitator may not be a good match for a large, formal congregation, for example.
- **Relevance.** Is the background and approach of the facilitator relevant to the congregation's situation?
- **Timeliness.** Is the facilitator available when the congregation needs him or her? Some negotiation of timing is appropriate, but if either party has to make substantial sacrifice to find a common time for work, it is not a good match.

## **BASIC MEETING DESIGN**

A basic and reliable meeting-planning framework consists of four steps: gathering data, defining the purpose, designing the process, and evaluating results.

- **Gathering data.** The facilitator gathers information about the congregation, such as its history with mutual ministry, planning material from the last mutual ministry cycle, and level of enthusiasm. This information is used by the facilitator to design the work.
- **Defining the purpose.** The facilitator works with the leaders or planning group to establish the purpose of each meeting or activity. The purpose should explain why the meeting is happening, who is involved, and what result is desired.
- **Designing the process.** Once a clear purpose has been established, the process for that meeting can be developed, as described in sections 2, 3, and 4.
- **Evaluating results.** This step involves reviewing the meeting, so that all participants know if the original purpose was met and how participants experienced the work. The information gathered here will help prepare for the next meeting.



## ENGAGING THE PEOPLE

The entire mutual ministry cycle depends on the willing involvement of people throughout the congregation. In other words, the parishioners must be engaged in their own individual and the congregation's collective ministry.

Richard Axelrod, large-system change consultant, explains in *Terms of Engagement* that many organization change efforts (like mutual ministry cycles) have foundered because they fail to win the hearts and minds of the people. A common approach to managing change is to select a special team of capable people, have them study the organization, and ask them to recommend changes. A common result is that the majority of members feel disenfranchised, and the recommendations cannot be implemented. New ideas are best implemented (the mutual ministry cycle's "doing the work" phase) when people have had a voice in the planning and have a high degree of freedom to take on the work most fulfilling to them.

For example, a large congregation vestry wanted to establish a strategic plan. The planning group succeeded in engaging the whole congregation, but then the vestry took over the planning effort and, in effect, said they knew better than the people. The people and the leaders lost touch with one another, and the plan was never completed or implemented. The antidote to these difficulties, according to Axelrod, is to use meeting and planning methods that engage the whole community in creating its own future.

*Terms of Engagement* suggests four principles that can assist facilitators and leaders in designing their activities for mutual ministry planning and review.

- Widen the circle of involvement.  
All mutual ministry efforts begin as the result of some individual's or small group's decision. This principle suggests that a strategy is needed to involve the remaining members. The overall result should be that all the people have an opportunity to participate.
- Connect people to each other.  
Mutual ministry depends on people knowing each other first as people and second as roles. To paraphrase Axelrod, when people connect with each other and to powerful ideas, creativity and action are ensured. Connection makes

people aware of the need for coordination of ministry efforts and makes that coordination possible.

- Create communities for action.

This engagement principle addresses the need to move beyond individual connections and create communities of people who have the will to get things done. The key idea is to organize people around common interests. When people are organized around common interests, they get more work done and can sustain themselves better than isolated ministers can.

- Embrace democratic principles.

Mutual ministry functions best when the voices of the congregation are heard by leaders. In democracies, free flow of information, opportunities to speak, and occasions to formally state preferences on issues (even if one's own preference is not selected) are seen as essential for the long-term well-being of the community.

Facilitators who find resistance to mutual ministry reviews or planning may be able to help the group move forward by addressing one or more of these principles.

## DIALOGUE VS. DEBATE

Dialogue is a valuable component of mutual ministry review because it evokes a common understanding of complex issues and their meaning in the community. The chart on the next page, which distinguishes between debate and dialogue, is a useful handout. (We thank the Public Conversations Project for permission to include the chart "Distinguishing Between Debate and Dialogue" in this resource.)

## DISTINGUISHING BETWEEN DEBATE AND DIALOGUE

DEBATE	DIALOGUE
Pre-meeting communication between sponsors and participants is minimal and largely irrelevant to what follows.	Pre-meeting contacts and preparation of participants are essential elements of the full process.
Participants tend to be leaders known for propounding a carefully crafted position. The personas displayed in the debate are usually already familiar to the public. The behavior of the participants tends to conform to stereotypes.	Those chosen to participate are not necessarily outspoken "leaders." Whoever they are, they speak as individuals whose own unique experiences differ in some respect from others on their "side." Their behavior is likely to vary in some degree and along some dimensions from stereotypic images others may hold of them.
The atmosphere is threatening. Attacks and interruptions are expected by participants and are usually permitted by moderators.	The atmosphere is one of safety. Facilitators propose, get agreement on, and enforce clear ground rules to enhance safety and promote respectful exchange.
Participants speak as representatives of groups.	Participants speak as individuals and from their own unique experience.
Participants speak to their own constituents and, perhaps, to the undecided middle.	Participants speak to each other.
Differences within "sides" are denied or minimized.	Differences among participants on the same "side" are revealed as individual and personal beliefs and values are explored.
Participants express unswerving commitment to a point of view, approach, or idea.	Participants express uncertainties as well as deeply held beliefs.
Participants listen in order to refute the other side's data and to expose faulty arguments. Questions are asked from a position of certainty. These questions are often rhetorical challenges or disguised statements.	Participants listen to understand and gain insight into the beliefs and concerns of the others. Questions are asked from a position of curiosity.
Statements are predictable and offer little new information.	New information surfaces.
Success requires simple impassioned statements.	Success requires exploration of the complexities of the issue being discussed.

## THE IMPORTANCE OF LANGUAGE

Almost everything that happens during mutual ministry review and planning involves people speaking with each other. The language (words, phrases, statements, or questions) used in conversation sets the tone for interaction and influences both how people think about the content and their behavior. Some words focus on what is wrong and lead to blame or harsh judgment; others help invite honest reflection and focus on the future. The words “evaluate,” “assess,” “judge,” “justify,” and “critique” tend to initiate conversations in which participants defend past actions. An entirely different conversation occurs when we are invited to reflect, share stories, learn, or understand. Both groups of words relate to the past, but the response to them is different. Regarding the future, a meeting to imagine, generate ideas, or create new opportunities provides more insightful conversation than one in which we are asked to justify our thinking, defend our cost projections, or prove that our idea will work. Here are some examples to explain the use of language more fully.

Imagine a meeting called to reflect on the past. Program leaders, vestry members, and clergy are in attendance. The facilitator can start the meeting by asking the group simply to talk about what happened. This is done before asking the group to make sense of the past. “What happened” might include “seven new people are attending,” “a new sidewalk has been completed,” “a new worship format has been adopted,” “a new education leader arrived.” It might also include the death of a long-time financial supporter or a meeting in which major conflict emerged. The facilitator helps the group identify events.

The next question might be either “Why did that happen?” or “What do you think lead up to those events?” When asked “Why?” people tend to either justify their own action or blame others for theirs. Asking “What do you think?” invites exploration and efforts to understand.

## SOME OTHER HELPFUL QUESTIONS

- What surprised you?  
Asking participants what surprised them allows them to register what happened that was different from what they expected. The surprises might be about unexpected

results, the way people interacted, or anything else that caught their attention, positive or negative.

- What did you learn?  
Finding out what was learned is a good way to conclude a review meeting, because it sets the stage for the future without blaming anyone for the past.
- What are the challenges?  
Switching to the future, it is helpful to ask about the challenges the group expects in the future. A challenge is often seen as a rallying point, a reason for volunteers to join hands. People rise to challenges. This is an invigorating alternative to anticipating problems.
- What are the possibilities?  
The word “possibilities” is all about the future. Because no one has seen the future, a group can safely describe things that do not yet exist. Talking about possibilities allows invention. No one has to act or take responsibility yet, and that frees up thinking.
- Where are the opportunities?  
Opportunity builds on possibility and narrows the options based on a variety of factors. Given existing resources, for example, some possibilities are more feasible than others. Using conversations to identify the best opportunity rather than to vote on which possibility people prefer leads to more thorough exploration.

## CONCLUSION

Facilitation is part science and part art. The facilitator needs to understand basic meeting design and consultation skills (the science). He or she also needs to know instinctively what to say to help a group move forward (the art). Selecting words carefully allows the facilitator to initiate honest and creative conversations without ignoring problems of the past or challenges of the future. Finally, talking from time to time about what is happening in mutual ministry review meetings fully rounds out the process. It might be called “reviewing the review process.” No meeting is perfect, and all facilitation can be improved—just like mutual ministry. A key task for facilitators is to set an example by continually improving their ways of working.

### Notes

1. Peter Block, *Flawless Consulting: A Guide to Getting Your Expertise Used* (San Francisco: Jossey-Bass/Pfeiffer, 1999).

## Section 6

# DIOCESAN POLICIES RELATED TO MUTUAL MINISTRY

Besides selecting an approach to mutual ministry review at the congregational level, it is also valuable to establish policies and principles for the diocese. Doing so formally sets the expectation that all congregations will conduct reviews. The Office of the Bishop can lead the way by using similar processes in its own ministry cycles.

Policies might address a number of areas:

- Annual reviews as a high priority
- The entire mutual ministry cycle as a means for good stewardship of resources
- A standard of mutual ministry distinct from clergy-centered reviews
- The relationship of the mutual ministry cycle to the call process
- Distinguishing mutual ministry review from salary planning
- The use of mutual ministry planning as support for grant requests
- Mutual ministry review as a basis for the bishop's visit to congregations—for example, to join in the celebration of ministries at the end of a mutual ministry cycle
- Resources required for reviews, such as trained facilitators

- Mutual ministry as a topic of discussion at clergy conferences
- Training at wardens' conferences
- Scriptural emphasis of accountability

Some of these possibilities have been addressed in the Dioceses of Oregon, Los Angeles, and Vermont. To view additional diocesan policies, please refer to the Episcopal Church Foundation Web site, [www.episcopalfoundation.org](http://www.episcopalfoundation.org).



## DIOCESE OF OREGON

### MUTUAL MINISTRY REVIEW POLICY

Operations Manual for Clergy and Lay Leadership in the Diocese of Oregon,  
April 2002

#### 5.0 Personnel Practices for Clergy and Congregation Mutual Ministry Review

##### **5.4 MUTUAL MINISTRY REVIEW**

5.4.1 Mutual Ministry Review of the ministries of the Rector/Vicar and Vestry/BAC and congregation is scheduled as provided in “The Operation Resource Manual for Clergy and Lay Leadership of the Diocese of Oregon” and “Covenant of Ministry” (8.3.1-3). A facilitator from outside the congregation is strongly recommended to enable the review process. Present are the Rector/Vicar and members of the Vestry/BAC plus other leaders (clergy or lay) necessary, such as education, music, worship, youth, and outreach.

5.4.2 The Mutual Ministry Review is a process recommended by the Diocesan Personnel Committee to assist congregations with effective annual review and planning based on mission, vision, and goals statements for congregational ministry mutually agreed on by Rector/Vicar and Vestry/BAC, and other congregational leadership. The congregation may affirm such statements in an appropriate manner determined by the Rector/Vicar and BAC/Vestry.

Each congregation is encouraged to articulate its mission, vision, and goals in current, descriptive, functional, and spiritual terms. What God is calling them to be and do as a people of God, however they choose to state it, becomes their action plan. The action plan should list a series of specific steps to reach the goals describing what is to be done, what resources in people are required, how progress will be measured, cost, who is accountable for what elements of the plan.

The first MMR, or the first with a new Rector or Vicar, a facilitator will be helpful in planning the review and establishing of mission, vision, and goals.

Usually, MMRs are done in Dec/Jan/Feb as Vestry/BAC prepares to change. Sometimes, they are connected to the Vestry/BAC orientation/planning event in Jan/Feb. Some congregations do their major planning during June because their program year runs from Sept to June.

Repeat the process yearly, updating mission, vision, and goals as appropriate.

The policy of the Diocese of Oregon is to separate the salary and benefits review from the MMR process. The Diocesan Personnel Committee yearly develops the “8.3.5 Current Compensation Schedule and SHU Administrative Practices and “8.3.6 Congregational Ranges” for clergy and congregational use.

Contact the Diocesan Office for names of facilitators and the MMR Handbook.

## DIOCESE OF LOS ANGELES

### MUTUAL MINISTRY REVIEW POLICY

*Copies of the models for Mutual Ministry Review mentioned in this policy are available from the Office of Clergy Development and Deployment—Diocese of Los Angeles.*

#### **I. Why conduct a Mutual Ministry Review (MMR)?**

To provide a review of the entire ministry of the parish in order to provide an opportunity for the clergy, the vestry, and the parish community to assess how effectively they are fulfilling their responsibilities to each other and their ministries. This process provides an opportunity to celebrate the ministry of the parish and the rector, as well as identify areas for growth and development.

#### **II. What is a Mutual Ministry Review?**

- An opportunity to discern God's will, to identify mutually agreed upon responsibilities, and a call for all ministers (clergy and laity) to be accountable for their ministry;
- An opportunity to identify ways to enhance the various ministries of the church and its people, including the lay persons, vestry, staff, and rector;
- An opportunity for education about the work of the various ministries of the church.
- It is *not* a method to resolve conflict or deal with problems and crises.
- It is *not* the performance of any one individual.
- It is *not* part of the clergy compensation discussion and salary negotiations. The MMR is an opportunity to provide feedback on performance and is a tool for development rather than part of compensation planning.

#### **III. What is the theological basis for Mutual Ministry Review?**

Observing and bearing witness to the activity of God and giving account of our actions to God are fundamental aspects of the Christian life. Jesus sent seventy disciples on a mission (*Luke 10*) to heal the sick and proclaim the Kingdom of God. These seventy returned to proclaim what miracles had happened in God's name. The parable of the talents (*Matthew 25*) portrays the need to be accountable to God for the gifts given to individual Christians. Together these two scriptures, bearing witness to the activity of God and giving an account of our actions, form the basis of MMR.

Ministry belongs to the people of God and not just one person. Saint Paul uses the image of the one body with many parts and functions (*I Corinthians 12*) to convey the need for the Christian community to work together. It is the shared responsibility of all Christians to discern what God is seeking to accomplish and actively align their will and purpose with God's will. The focus of the MMR is not on any one individual's responsibility but the community's responsibility to observe and review their ministries within their commitment to follow Christ and be God's people.

#### **IV. Should a third-party facilitator be used?**

It is recommended that the clergy and vestry seek the assistance of a third-party facilitator to assist with the mutual ministry review process. The facilitator should be a neutral party who is familiar with church policy and procedures, as well as skilled in facilitating an open and honest discussion. This person should be able to assist the subcommittee with the most effective approach to the MMR based upon the current parish environment. Additionally, the facilitator will provide guidance on the types of questions and tools which will most effectively gather the information pertinent to the MMR process.

The Diocesan Office of Clergy Development and Deployment can provide a list of recommended third-party facilitators to assist with the MMR process.

#### **V. Should Mutual Ministry Review be conducted if there is conflict?**

If there is conflict between the rector, vestry, or parishioners, then the time is not right for MMR. Conflict may even occur surrounding the implementation of the MMR process when one group is demanding MMR and another group is resistant. MMR should not begin in this environment. At this time, it would be appropriate to seek assistance with conflict resolution.

#### **VI. How is a Mutual Ministry Review process implemented?**

1. In order to conduct a Mutual Ministry Review, the parish must have pre-established criteria which defines who they are as a parish and how their mission is enacted in the community. Therefore, in order to conduct MMR the parish must have a mission statement and goals. If the parish does not have a mission statement and specific goals, then the first step must be the development of the mission statement and measurable, verifiable goals.
2. The vestry selects a subcommittee, including the rector and a mutually agreed-upon third party facilitator, to develop an effective process and prepare a final report.
3. Congregations will have differing needs when approaching the MMR. The following methods are to be used as guidelines for the approach which will best serve the needs of the parish. It is recommended that the subcommittee,

in consultation with the facilitator, prayerfully consider which of the following will best meet their needs.

- a) Near the end of the first year of a new rectorship, the most effective process is to revisit the Parish Profile developed during the Search Process. This Profile identified rector responsibilities and parish goals which were important to the parish. It would be appropriate to review the first year of the new pastoral relationship in light of the expectations identified in the Parish Profile. Model A provides a sample of this type of MMR process.
- b) In missions or small parishes, characterized by individuals assuming multiple ministry roles, a MMR may consist of a discussion between the vestry and the rector/vicar. This discussion would review the current ministry of the mission/parish, expectations for the performance of that ministry, and plans/goals for the next year. Model B provides a sample of this type of MMR process.
- c) In large or program-sized parishes, characterized by ministry being provided by corporate worship and several distinct programs, MMR may take on different forms. The parish as a whole, or sub-groupings of parishioners who have experience of a program's ministry, may be surveyed. Alternatively, the survey may be limited to the rector and the vestry. Model C provides a sample of this type of MMR survey.
- d) In a parish which has utilized the MMR process and identified specific goals and objectives, a focused MMR may be utilized. In this instance, a limited number of ministry areas, with established individual goals, would be the focus of the MMR. This information can be gathered by the use of a questionnaire or interviews with persons who have direct experience of the ministry area.

For example, a focused MMR could be developed from the previous year's goal which was: *to develop children's Sunday school programs which are well balanced, relevant, and involving, and have sufficient teachers. This would be evident by parental support for the religious education program by bringing their children regularly.* In order to learn about the effectiveness of the parish's efforts in this area it would be helpful to interview representative Sunday school students, teachers, parents, and clergy.

- e) A comprehensive review, which typically is conducted every five to ten years, may consist of a multi-part process which includes a survey of the parish community, an evaluation of the vestry's ministry by the vestry and clergy, and an evaluation of the individual clergy's ministry by the vestry and the clergy. The Parish Survey and small group process used in the search for a rector can provide the basis for this comprehensive MMR.

4. The timing of the distribution of the questionnaires and/or interviews is important if the vestry intends to use the information to establish goals at the annual vestry planning retreat. Sufficient time needs to be allowed for distribution and return of the surveys, as well as preparation of the final report.
5. The subcommittee's report to the vestry should include a tabulation of the results of survey(s) and/or interviews, as well as recommendations based on the trends identified in the responses. If an individual review of the rector is conducted, it is important that the subcommittee meet with the rector to review these results and allow for feedback prior to presentation to the vestry.
6. The vestry can evaluate these recommendations and consider them for inclusion in the parish goals for the year and for individual goals of the rector and staff, as appropriate. It is important that the goals are specific, measurable, achievable, and verifiable.

## DIOCESE OF VERMONT

### LETTER OF AGREEMENT

The following is an excerpt from the Diocese of Vermont's template for a Letter of Agreement between a congregation and its clergy. Section I outlines diocesan expectations with regard to The Mutual Review of Ministry.

#### **Section I. Mutual Review of Ministry**

The Rector, Wardens, and Vestry agree to have an annual discussion and mutual review of the total ministry of the congregation, in order to:

- . . . assess how well the Rector, Wardens, and Vestry are fulfilling their responsibilities to each other and to the ministry they share.
- . . . establish goals for the work of the congregation for the coming year. (These goals will serve as the basis for mutual ministry review for each subsequent year.)
- . . . identify areas of conflict or disappointment that may be adversely affecting mutual ministry.
- . . . clarify expectations of all parties and, in particular, make sure that all parties continue to understand this agreement and the position description of the Rector in the same way

The Wardens and Vestry agree that the basis for the mutual review of ministry for the first year will be those developed in the self-study portion of the discernment process. Any instrument used must be approved by the Bishop and facilitated by a designated person.

*This substance of this section is required by the Bishop. Details of the mutual ministry review may be expanded or supplemented.*

## Section 7

# BIBLIOGRAPHY

*This bibliography is a combination of references cited and miscellaneous supporting material. Additional information and resources can be found on the Episcopal Church Foundation Web site, [www.episcopalfoundation.org](http://www.episcopalfoundation.org).*

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### For More Information

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### Web Sites

Axelrod Group: Collaborative System Designers  
[www.axelrodgroup.com](http://www.axelrodgroup.com)

The Axelrod Group is a for-profit firm that consults with businesses and organizations to create collaborative change within organizations. They offer workshops and coaching.

Church Development Institute  
[www.cditrainers.org](http://www.cditrainers.org)

The Church Development Institute is an Episcopal group of trainers and consultants offering workshops and training for clergy and lay leaders in the area of congregational leadership development.

Clergy Leadership Institute  
[www.clergyleadership.com](http://www.clergyleadership.com)

The Clergy Leadership Institute is the Web site of Rob and Kim Voyle. They offer training and consultation to clergy and congregations, primarily using Appreciative Inquiry. Rob is an Episcopal priest and Kim is a career counselor.

Congregational Resource Guide  
[www.congregationalresources.org](http://www.congregationalresources.org)

The Congregational Resource Guide is a joint effort by The Alban Institute and The Indianapolis Center for Congregations and is funded by the Lilly Endowment. They offer extensive resources on all manner of congregational development, conflict issues, and leadership concerns.

Robert K. Greenleaf Center for Servant-Leadership

[www.greenleaf.org](http://www.greenleaf.org)

The Greenleaf Center is a nonprofit center that promotes research and provides resources on the “servant leadership” work of Robert Greenleaf.

Leadership Training Institute

[www.lti-episcopal.org](http://www.lti-episcopal.org)

The Leadership Training Institute offers four laboratory-based learning events. The labs address basic human interaction, design skills, group development, and consultation skills. All labs are experiential in nature, and participants learn through reflection on their experiences. Skills in giving and receiving feedback as well as effective communication are practiced in all labs. These are valuable skills for those facilitating congregations through mutual ministry reviews.

Public Conversations Project

[www.publicconversations.org](http://www.publicconversations.org)

The Public Conversations Project (PCP) grew out of the work of family therapists interested in applying family therapy techniques to issues of social conflict in larger groups. Their “Guide to Community Dialogue” is an excellent resource for structured dialogue in groups. In addition to ongoing research, PCP offers consulting services and workshop training for people who would like to learn to facilitate such dialogues.

Trustee Leadership Development

[www.tld.org](http://www.tld.org)

Trustee Leadership Development offers leadership education for individuals; governance and development consultation for boards; and coaching and mentoring for executives, volunteers, and employees.

Worshipful Work

[www.worshipful-work.org](http://www.worshipful-work.org)

Worshipful Work: Center for Transforming Religious Leadership is an ecumenical group that builds on the work of Charles M. Olsen (author of *Transforming Church Boards into Communities of Spiritual Leaders*). It is committed to providing resources to congregational and denominational bodies and enabling them to integrate spirituality and administration.