

ASSESSUMC®

**MANUAL
FOR
WNCCUMC
PASTORS**

THE
PENNY
GROUP

OCTOBER, 2021

What are YOUR church leaders' priorities?

Success in any position -- including that of a pastor -- is not simply a matter of hard work and long hours.

Success also requires knowing *what* to work hard on.

It sounds so obvious. Yet many church leaders admit they're uncomfortable discussing perceptions and priorities candidly with their pastor. "I love the pastor! I'd never hurt her feelings!" or "I don't want the pastor to feel unappreciated! He works *so* hard!"

But pastoral success requires more than working hard or being beloved. A key factor is whether the pastor and church leaders are focused on the same priorities, and agree on how those priorities should be achieved.

The simple fact is this: church leaders DO have perceptions about their pastor's role and focus, and DO talk with others about those perceptions. They just don't always discuss their perceptions directly with the pastor.

Your probability of success increases dramatically when you and your leaders discuss what priorities matter and how best to achieve them. That doesn't mean that you can't challenge your leaders and influence their priorities. **You can and you should!** But it *does* mean that when you and your leadership are working on different agendas, when your leaders don't understand what you're working on, or you are unaware of how your actions are perceived, it's much less likely that you will achieve the success that both you and your leaders want.

The AssessUMC® process addresses that directly. The process:

- 1) makes it easier for congregational leaders to communicate clearly their priorities and perceptions; and
- 2) for you -- as their pastor -- to lead a productive dialogue about how best to achieve dramatic results that truly matter.

This instruction booklet describes how to accomplish that.

The AssessUMC® process is unique in 5 keys ways

1. The AssessUMC® process looks forward.

The process is not about evaluating the past. It's about creating a roadmap for the future, and enhancing the communication between pastors and their congregational leaders.

2. The online questionnaire asks about behaviors and actions, *not personality*.

Questionnaires that ask you to rate a pastor's "initiative," or "creativity" on a 5-point scale in no way reflect how people actually make judgements and decisions. More importantly, such questionnaires rarely result in meaningful change. AssessUMC® defines the specific actions and behaviors that will enhance your success going forward.

3. The process takes just 5 minutes to complete. *Really ... 5 minutes.*

The questionnaire asks respondents to answer just 4 questions. It does not use ratings. Respondents are asked to chose which of 21 pastoral behaviors (adapted from the Towers-Watson research) match with their perceptions. That's it.

4. The results are specific to you and to your church.

From those individual results, we can report 1) how your church leaders envision success *and* 2) what specific behaviors your leaders want you to focus on in the coming year. You can see individual comments and trends *across* individuals. You know *who* responded, but *not* who said what.

5. You, as the pastor, then lead the process of clarification and action.

You use the leaders' perceptions to create a dialogue focused on how you and your church can together achieve more, focusing on one common agenda. That helps everyone.

What your church's AssessUMC® responses will tell you ... and what they won't tell you

The data will be organized to show what's most important to the leaders of your church. You will see which of 21 skills and behaviors your leaders think will move the church forward (“essential”), and which behaviors they believe won't move the church forward *even if you spend time and effort working on them* (“low priority”).

Your data will be posted as a customized roadmap. On some behaviors, your leaders will confirm you are focused exactly as they want you to be for the church to become even more successful. In other areas, leaders will suggest you refocus. You may or may not *agree* with those perceptions, but either way, you *first need to understand them*. That's where we are now.

Your reports will prioritize the 21 items from most important to least important. Having first grouped them by importance, the reports then tell you whether to keep addressing the issue as you have been, or change your approach to it.

Every pastor will have behaviors that *could* be improved. One key benefit of the report is that it will tell you whether that skill merits more time and effort. If it's in the “low priority” group, stop worrying about it! *Focus your efforts on the essential items!*

The report does NOT tell you anything about your skills relative to other pastors.

- Every pastor -- even the *most* effective -- has vulnerabilities. The report will show that.
- Every pastor -- even the *least* effective -- has strengths. The report will also show that.

What matters is how a pastor's skills align with the needs of a particular church's needs.

The report DOES tells you how your strengths and vulnerabilities match with the priorities that *your* church leaders want to emphasize. Put simply, if the skills essential to your leaders are ones they see as strengths, you're more likely to be successful. If the skills essential to them are ones they see as needing significant change, you have work to do.

SO ... let's get started!

There are *two* reports: an abbreviated one for leaders; and a detailed one for you

The two reports use the same data and tell the same story. They differ in the amount of detail they provide. The abbreviated report is simpler to read; it is the one to share with your leaders. The detailed report should go *only* to you and your DS.

- **Both reports divide the 21 behaviors into 3 lists:**

ESSENTIAL behaviors; IMPORTANT behaviors; LOW PRIORITY behaviors.

The groupings are made statistically by examining the number of responses received and the amount of variance there is among the responses on two questions:

- a) the THREE behaviors perceived as most important for success at your church; and
- b) the ONE item the respondent says the pastor MUST “focus on” this year, and *why*.

Both reports show how many leaders chose each item as “important” (question “a”) and how many chose it as their ONE “focus on” behavior (question “b”).

- **Once the 21 behaviors are ordered by importance, we report how leaders perceive you, the pastor, on each.**

On the abbreviated report, we label each behavior as “effective,” “adequate,” or “needing change”; that’s enough to guide you and your leadership group. On the detailed report, we provide a *score* of perceived effectiveness, and use colors for easy reading.

- **On the detailed report, we also show the pastor’s self-assessment.**

You completed the *same questionnaire -- using the same instructions --* as your leaders.

The identification of items you labeled as important are printed in blue. Your assessment of your own effectiveness for each behavior is shown in the far-right column.

If your perceptions differ from your leaders’ perceptions, it doesn’t mean the leaders are correct and you are wrong, or visa-versa. It does mean you and your leaders see things differently.

What does that mean? It means you need to talk.

Now you need to set up a meeting with your leaders

1. Tell your leaders that you have your AssessUMC results. Do this NOW.

Contact *all* of the leaders whom you asked to respond, *including those who didn't answer*. Tell them that you are looking forward to meeting with them. Send out an initial email (a sample is below), then coordinate the meeting through your S/PPRC Chair.

It IS important that you take the lead in this process: you asked for their responses, and you will be leading the meeting.

First schedule the meeting. Then distribute the abbreviated report 3 days before the meeting.

2. Establish immediately that you view this meeting as positive.

Your leaders are nervous about your reaction to the perceptions they reported -- not because their perceptions were negative, but because they don't know what *your* reaction will be!

As you speak with leaders before the meeting, thank them for responding and reiterate how useful you think this will be.

3. If it's at all possible to meet face-to-face for this meeting, do so.

More than 70% of communication is non-verbal. Your meeting will achieve better results if it's held in person. That said, it's better to meet sooner online than to wait *months* for in-person.

Sample email to ALL church leaders you originally reached out to:

A few weeks ago I asked you to complete a short questionnaire about our church. The questionnaire asked you to identify the skills and behaviors you view as most important.

Thank you for completing that questionnaire.

I have received the report summarizing the leadership team's perceptions. The report is very helpful and I am confident it will assist us as a church.

I will work with [S/PPRC leader's name] to set a date and time when we can meet to discuss the report.

Thank you again.

Questions before you meet

1. Should I include leaders who didn't respond?

YES! Your request to respond may have come at a particularly busy time in that leader's life; the leader may have been nervous about giving feedback; or he/she may have thought "why bother -- nothing will happen anyway!" By including now *all* leaders who were invited to participate, even if they didn't answer, you can involve them in the post-survey discussion, the most important part of the process!

2. I began a new placement in July, just 2 months ago. Should I still do this?

Absolutely!

Position this conversation much like an "on-boarding interview." You will have the chance to speak openly with the group about their priorities and comments. *Those comments will help you better understand them.* Then, when you present your plan, that meeting will help the group better understand you!

Follow the process outlined on page 8.

3. Everyone's perceptions have changed during the pandemic. Won't that affect their questionnaire responses?

Yes, which makes it even more essential to address this now, even if you *think* you know your leaders! The fact that every church will be changing again in the coming months makes this the *perfect* time to meet with your leadership team.

4. We are a husband/wife clergy team. Should we have one meeting or two?

Your leaders completed separate questionnaires for each of you. It's likely that the priorities **WILL** differ for the two of you, just as your strengths/vulnerabilities differ. You should, *definitely*, therefore, have separate meetings (and neither should attend the other's meeting). The two of you can then discuss the meetings and jointly come up with your action plan. *You should, on the other hand, conduct just one 2nd meeting (see page 10).*

Your *FIRST* meeting with leaders: *Listening and understanding ONLY*

- 1. As soon as you have the floor in the meeting say: “Thank you for completing the questionnaire and thank you for meeting with me. I am excited to talk with you about achieving more together.” Use those words exactly.**

Make sure that everyone has a copy of the abbreviated report. Then begin.
- 2. Explain the report format; be sure everyone understands it. Then read the first essential item, exactly as it’s worded. Say, “What does that mean at [church name]?”**

Then be quiet. Don’t read the comments. Don’t explain *your* ideas. *Just be quiet.* There WILL be silence, and it will be *uncomfortable*. That’s fine. After a long pause, someone *will* speak. Most likely, the person will then restate the item, *but still not define it.*
- 3. Whatever is said, nod your head, then say, “Tell me more.” Then start taking notes.**

“Tell me more” indicates you want to listen and learn. If you respond *only* “Tell me more” (repeatedly, as additional information is added, bit-by-bit), *the group will begin to open up.* Once they know you’re *not* going to respond negatively, leaders will begin to explain why they view that issue as important, and why they want you to focus on it. At this point, there’s nothing for you to say! Just listen and take notes. **The less you talk, the better.**
- 4. As the group elaborates, repeat “Tell me more” and ask for additional clarification.**

Saying “tell me more” again *will* feel awkward to you. But if you’re listening, nodding, and taking notes, saying “tell me more” will sound very natural *to the group.* It *will* be difficult for you *not* to comment or to describe how *you* interpreted the item. You may hear comments that you think are unfair or just wrong. But the objective in this meeting isn’t to change minds; your objective is to learn what this group wants and thinks. *Your ONLY objective is to listen!*
- 5. Summarize; restate what you heard and ask “is that correct”? Then move on.**

Repeat the process with the second ESSENTIAL behavior. Read the item. Ask what it means at your church. Listen. Say, “tell me more.” Take notes. *Repeat!*
- 6. Once you have covered the items labeled as ESSENTIAL, move to close the meeting. Say, “This was very helpful. I now know what I need to focus on. I want to assemble a plan and meet again. Can we set a date to do that?”**

Remember to record the date of your meeting on your AssessUMC homepage.

Use what you learned in Meeting #1 to build *your* action plan

1. Set aside several 2 hour blocks for creating your plan.

- PRAY. Ask God to help you clearly understand the message. The objective is this:
How can you use this information to truly move your church forward?
- First review the notes you collected in your listening meeting.
- Then review the *full report* (not the abbreviated one you gave to your leaders).
- Compare your self-assessments to the leaders' assessments. What do you see?
- **Look for trends. Essential and Important items generally have a theme. What is it?**
- Try to be objective. If these were someone else's responses, what pattern would you see?
- Ask yourself, "What are my church leaders *really* telling me?"
- Finally, give yourself some time to reflect and ponder. *Then* begin your action plan.

2. Tackle each of your ESSENTIAL priorities, dealing with them one-by-one.

Your objective is to create a specific action plan for each of the ESSENTIAL behaviors.

- If the behavior is already a strength, you need a plan to *capitalize* on that talent.
- If leaders reported you're "Adequate" or "Need Improvement," they're saying you need to rethink how you currently address that issue. What will you do differently?

Whatever the message, you do NOT have to do it all yourself! *Consider how you can enlist others to accomplish what you don't have time to do, or simply don't do well.*

Example: Your leaders believe that providing more pastoral care is a priority, especially for older members. Perhaps the right solution is for you to increase the time and attention you devote to that. But what if you know this isn't a strength? Could a better solution be to begin building care groups, with church members caring for each other?

Your job as the church leader is to come up with a plan, not to do it all yourself!

3. Create ideas that respond *directly* to your leaders' priorities.

This IS your opportunity to propose NEW ideas to accomplish what your church needs!

You WILL have the full attention and commitment of the leadership group when you present your ideas; after all, you're addressing issues they described as important to them. Be creative. Ask others for help. Everyone wants the church to succeed. Don't limit yourself or your church by assuming the traditional path is the best one!

Your *SECOND* meeting with leaders: *Pastoral leadership in action*

1. Open the meeting by again thanking leaders for participating:

“Thank you for our last meeting; it was very helpful. In this meeting I want to talk about my plan to accomplish the results you’re looking for.”

Pass out your agenda. Don’t list all your ideas, but DO list the essential behaviors you’ve worked on. In the last meeting you listened; in this meeting, it’s your turn to talk.

2. **“Let’s begin with the top priority from the last meeting.” Read the issue.**

Then say, “My understanding is that this means” Then define the behavior as you heard it. Your next sentence should be, “You want me to ...,” and state the expectation (e.g., “Capitalize on this strength more,” “Change the way I have approached this in the past,” etc.). You’ve now established that you heard them. *They’re all ears!*

3. **Because you listened (ONLY) in the 1st meeting, you’ve earned the opportunity to propose YOUR ideas. This is your time to do so.**

You demonstrated in the first meeting that you were open to their ideas and perceptions. Your leadership is fully convinced that you will bring back solutions and actions. The key is to connect *your* ideas to the *group’s* priorities.

4. **Make specific proposals with specific check-points. This is crucial.**

To continue with the example of pastoral care, for example, you might explain how forming care groups helps not only *that* priority, but also “encourages and empowers each member to take an active role in this church” (a different need). You would then explain *how* you plan to form the groups, the timetable for the initiative, and how you’ll ensure it’s working.

5. **Answer questions. Make improvements as needed. Write a summary of the meeting with your plan. Distribute it.**

Your leadership WILL be impressed. You can proceed knowing you and your leadership are working on the same agreed-upon goals.

Congratulations! You did it!

(Remember to record your action planning meeting date online!)