

PERFORMANCE EVALUATION AT UUCF

SERVING THE MISSION – HOW CAN WE TELL WE ARE DOING IT WELL?

Program Evaluation Committee Report March 18, 2022

Introduction

In the Spring of 2021, the Program Evaluation Committee (PEC) convened¹ to evaluate performance evaluation at UUCF. Our initial inquiry question was, “How are evaluations conducted at UUCF, and what are we evaluating?”

UUCF was not the only church posing the question. How to conduct meaningful evaluations is a recurrent theme among UU congregations and among organizations at large. At the time the PEC undertook this assignment, meaningful evaluations at UUCF had been an unresolved issue exacerbated in part by pandemic-imposed distancing.² To deepen our understanding of the issue, the PEC interviewed entities at UUCF who are officially subject to performance evaluation: the two Ministers, the Board,³ the Staff,⁴ and the Coordinating Team (CT). The PEC also interviewed ministers and staff of five UU congregations (see below) and conducted a literature review (see [Attachment 1](#)).

The PEC reoriented the inquiry question based on what we learned to “What do we want from a performance evaluation process, and what might be an approach to get us there?”

This report presents PEC findings and insights on performance evaluation activities at UUCF between 2019 and July 2021 and comprises four parts:

1. the recent evolution of performance evaluation (PE) in organizations;
2. the current state at UUCF and at the five congregations interviewed by the PEC;
3. options for the future; and
4. PEC’s recommendations.

This report focuses solely on performance evaluation of people. In addition to human performance evaluation, UUCF also evaluates programs, activities, and projects to determine the relevance, importance, and success of these undertakings. These evaluations help ensure that UUCF activities are aligned with mission and objectives; allow UUCF to learn, confirm, and

¹ PEC members: Gina King Wells, Nancy Smith, Hanh Michael. We met regularly from March to September 2021.

² The most recent evaluation of the Minister was in 2018.

³ The Board was represented by three members: Rich Williams, Kay Cook, and Matt Higgins.

⁴ The Staff was represented by Bill Braband and Diana Tycer.

improve our offerings to the congregation and the community; and help to improve processes and ensure that UUCF uses its budget as meaningfully as possible.

Evolution of Performance Evaluation

An overview of human resources literature in the past 5-7 years showed that the evaluation landscape has changed. Traditional performance evaluation is the assessment of past performance in a given time period, with the purpose of judging “how well employees have performed relevant to expectations and to use this information to make a variety of talent and organizational decisions” such as promotions, compensation, training and development, retention, etc.⁵ This model, however, has been critiqued as being at odds with what people need today. Indeed, most managers and employees do not find traditional evaluations valuable or motivating. Instead, they find the process frustrating, bureaucratic, often demoralizing, and time consuming.

Recognizing the limitations of the traditional performance evaluation model, many organizations questioned whether they should retain evaluations at all. In today’s reality of uncertain and volatile situations, organizations have evolved into being more agile (responding to new or unexpected needs), more dependent on teams (which makes evaluation of individuals insufficient), and “flatter” in structure (fewer clear lines between supervisor and supervisee, i.e., more interconnectedness among functions to operate well, which requires different measures of success). The typical corporate-style evaluation method is no longer adequate in many circumstances, notably in the non-profit world.

The limitations of performance evaluations gave rise to the idea of performance management – the broad collection of activities with the purpose of maximizing and aligning individual performance to achieve organizational goals. Performance management asks: what outcomes does the organization seek to achieve, and how can a performance management approach support these outcomes? The performance management approach, however, would require a shift in thinking habits: an emphasis on simplicity, flexibility, relationships and communication while de-emphasizing rigidity, complexity, and stalwart adherence to policies and procedures.

Performance is also assessed increasingly against notions such as values, mission, and outcomes (aka “ends” at UUCF), as opposed to only against expected activities based on a job description. Upward evaluations have also grown more popular to give voice to different perspectives. As noted also by the National Council of Nonprofits, “the performance appraisal can be used effectively to align individual employees’ goals with the organization’s goals, and to monitor the extent to which an individual’s performance (or that of his/her team) is moving the organization closer to desired outcomes.”⁶

⁵ SHRM, [“Performance Management That Makes a Difference: An Evidence-Based Approach”](#) (December 2017), p.7.

⁶ [“What’s New in Employee Performance Evaluations”](#) (October 13, 2016)

Current State

In this section, we will present (i) the mandate for evaluations at UUCF, (ii) a summary of interviews held with UUCF leaders and a summary of evaluation activities at UUCF during the period 2018 – 2021, and (iii) evaluations at the congregations that the PEC interviewed.

Mandate for Evaluation at UUCF

Evaluations at UUCF are governed by the Governance Manual and the Letter of Call and Ministry Agreement for each minister (henceforth “Letter of Agreement”).

The **Minister** has the following evaluations responsibilities (per the [Letter of Agreement](#)):⁷

2.7.2. The Minister shall conduct or oversee annual staff evaluations and, subject to limits defined by the Board, shall make decisions together with the Coordinating Team on hiring, discharging and changing compensation for staff positions where no Board approval is required. For Board-appointed positions and other decisions that require approval by the Board, the Minister shall recommend personnel actions to the Board, and the Board and Minister shall jointly decide on hiring, discharging, and changing compensation of staff in those cases.

2.9. Evaluation of the Ministry

An assessment of the work of the Minister and the ministry of the Congregation will be conducted every year by the Board or its delegate.

The **Board** has the following evaluations responsibilities (from the [Governance Manual](#), April 2017):

The Board’s primary activities include “systematically evaluating the performance of the parish minister, the Coordinating Team (CT) and the Board itself.” (p. 1)

The Board shall fulfill several responsibilities: (p. 4)

...

- Assess UUCF’s success in achieving the Vision;*
- Assess the performance of the Board, the CT, and the parish minister against the Vision.*
- Represent the Congregation in determining appropriate organizational performance;*

The Board will assess the parish minister annually in his or her capacity as minister and leader of the CT. The Board shall assess CT performance annually. The Board shall view the CT as successful to the extent that the Plan and the Vision are achieved, the CT’s limitations are respected and the CT’s responsibilities are fulfilled. (p. 7)

⁷ The Letter of Agreement with Rev. David Miller is dated April 2, 2015.

Continual Board development must include orientation of new Board members. Training shall include the following topics: (p. 7)

...

- Process for Board self-assessment;

...

The CT has the following evaluations responsibilities (from the [Governance Manual](#), April 2017):

The CT is accountable to the Board for its performance. The CT is empowered to choose whatever means it finds most effective to accomplish its goals and further the mission of the Congregation, so long as those means do not transgress the limitations in this section. (p. 8)

The CT shall treat staff in the following manner: (p. 11)

- 1. Maintain written job descriptions and personnel policies that clarify roles for paid staff;*
- 3. Ensure staff receive clear expectations and goals for performance;*
- 4. Maintain a performance review protocol for staff evaluations and ensure that paid staff receive written performance reviews annually;...*

Current Evaluation Practice at UUCF

In the winter of 2021, the PEC interviewed members of the Board, the Ministers, and other key Staff to understand how assessment and evaluation activities had been carried out in the last few years. Our findings are summarized below:

- **The Board is well-organized to perform its assessment and evaluation responsibilities.** The Board designates specific members to undertake evaluation responsibilities each year (e.g., to evaluate itself, the Senior Minister, and the CT), and provides members who are new to these roles with mentorship or information to support their evaluation assignments. However, the topic of evaluations was often not raised until late in the church year, “almost as an afterthought” per an interviewed member.
- **The Board did not conduct an evaluation of the Senior Minister in 2019 or 2020.** In both years, the Board sought to initiate the evaluation, the Senior Minister responded with concerns and questions about the approach and proposed a different approach. The Board and Senior Minister did not appear to have agreed on a common process to date.
- **The Board has the most developed self-evaluation process.** In 2020, the Board implemented a process that included seeking feedback from Board members, the CT, and select congregants. As a result, the Board identified activities that it can improve (e.g., communication with congregants).
- **The CT has not devoted significant time to its Staff evaluation oversight responsibilities.** The current CT has not ensured that Staff receive clear expectations and goals for performance or maintains a performance review protocol for Staff evaluations. In recognition of the

importance of this function, however, the CT requested that the PEC examine the issue of evaluations to inform its role going forward.

- **Within the Staff, certain managers perform evaluations more consistently than others.**
- **The Vision, as described in the Ends Statement, does not appear to be central to current evaluation practices at UUCF** as it is in some other congregations (see more below).
- **There is not a shared understanding of why, what, or how to evaluate.** From interviews with select members of the Board, there did not appear to be consensus around what to evaluate (e.g., “what” based on the Letter of Agreement which was issued years ago, what does “ministry” include, or the results of work performed during the year based on the Ends) or how to evaluate (e.g., a form? Interview with a group of “random” congregants? etc.).

In sum, there appears to be an absence of a shared meaning and/or practices around performance evaluation across entities at the leadership level (Ministers, Board, Staff, CT). With the pandemic, we had to adjust our operations, giving rise to different ways of performing and a new awareness about what is meaningful. As a result, the current evaluation process at UUCF is no longer adequate at the individual level or at the organizational level.

At the same time, however, while leadership does not share common philosophies, definitions, or practices, each entity has pondered separately evaluation-related questions such as:

- what would constitute an evaluation (format)?
- what should be the basis for any evaluation (job description and/or some other standard)?
- what should an evaluation do for the individual (especially in the absence of normally anticipated pay raise or promotion following a performance review)?
- what would be missing if there were no evaluation at all (e.g., effect on behavior or morale)?
- how frequently would it be helpful to have an evaluation discussion (format, timing), etc.?

An exploration of the above ponderings would help create more understanding of each entity’s hopes and needs so that the whole may be integral.

Summary of Evaluation Activities at UUCF for the Period 2018 – 2021

	History (2018 to present)	Method Used
Board evaluation of Minister Frequency: once annually	<ul style="list-style-type: none"> - 2018: most recent evaluation. - 2019: no evaluation because ministry team in flux - 2020: no evaluation--requests to schedule evaluations were made, but no resolution over disagreement on the method. - 2021: no evaluation. 	Feedback sought from a select group of congregants via a 100-question survey which included space for comments. Survey results shared with Minister. See Attachment 2 for the survey.
Board evaluation of CT Frequency: once annually	- 2020: most recent evaluation	Designated members of the Board meet with members of the CT.
Board evaluation of self Frequency: once annually	- 2020: most recent evaluation	<ul style="list-style-type: none"> - Self-evaluation form listing major responsibilities of the Board as a whole and of individual members. - Form to collect feedback from the CT - Form to collect feedback from congregants
CT oversight of Staff evaluation Frequency: once annually	No specific record in history. Staff do not have current performance goals and there is no performance review protocol.	Unknown.
Minister evaluation of Staff Frequency: once annually	<ul style="list-style-type: none"> - No specific record of Minister's evaluation of staff - DRE conducts evaluations of one direct report annually. Most recent: 2020 	Unknown.

Evaluation Activities at Other Churches

To inform the PEC's work, we interviewed five UU congregations from across the country about their evaluation practices:

- Unity Church-Unitarian (St. Paul, MN) – Laura Park, Dir. of Membership & Hospitality
- First Universalist Church of Minneapolis – Rev. Jen Crow, Co-Senior Minister
- Community Church of Chapel Hill – Thom Belote, Senior Minister
- Oak Ridge UU – Jake Morrill, Minister
- First Unitarian Church of Portland (OR) – Bill Sinkford, Senior Minister

The frequency of evaluation at these congregations ranged from regular and robust to sporadic and minimal. An example of a more robust process is practiced at Unity Church - Unitarian (St. Paul, MN). Per Laura Park, whom we interviewed, evaluations are performed consistently every year, and the process was described as dynamic, engaging, and collaborative while also focused on the church's Ends. The Board and the Executive Team (ET, equiv. to our CT) use the [same questionnaire to assess the ET's](#) effectiveness, showing key elements of performance and measures that have been discussed and agreed to beforehand. At this church, the ET has broad latitude in advancing the Ends as long as it also steers clear of violating the Limitations.

The Board focuses on effectively identifying the outcomes of religious life and receiving feedback on whether the congregation is making progress on those outcomes. It performs a [self-evaluation](#) that assesses its effectiveness, relationship with the ET, and administrative "mechanics." As for the ministers, the "formal" evaluation process comprises quarterly check-ins with the Board during which observations, concerns, accomplishments, challenges, financial statuses, etc. are shared and discussed. At the end of the year, a formal evaluation meeting is held to sum up the previous quarterly meetings and chart a way forward.

Ministers also receive feedback from a number of other sources. Not only do they hear from congregants at large who share their suggestions and likes/dislikes, ministers also seek feedback and support in very targeted ways from colleagues and lay leaders to gain a balanced view of the state of the church and what the congregation needs to move forward on its goals.

A summary of the practices at the five interviewed churches is provided in [Attachment 3](#).

Options for the Future

The question remains, what do we want from a performance evaluation process, and what might be an approach to get us there? There are many options for UUCF:

1. Explore and practice an approach similar to that which is presented in [Governance and Ministry](#) (Dan Hotchkiss) where roles, responsibilities, and steps have been outlined.⁸

⁸ Governance and Ministry, Dan Hotchkiss, pp. 142-157.

2. Emulate activities practiced at another congregation, e.g., Unity Church – Unitarian, such as using Ends and Limitations as anchors for evaluating the Executive Team and for the Annual Report.

3. Create a process that might combine the wisdoms to reflect the hopes and needs at UUCF and re-energize connections as we go forward. We could capitalize on ideas and thoughts already developed internally (e.g., the [ponderings](#) presented in the interview findings, above). We could shift from performance evaluation to a more collaborative and dynamic form of performance management.

Irrespective of the chosen option, a sound evaluation process is one that is designed with today's realities in mind, incorporating "industry" guiding principles (aka "best-practices") such as:

- 1) **Psychological safety** to freely raise issues, explore, experiment, pilot, evaluate, or adjust courses of action
- 2) **Shared clarity of vision, mission, or outcomes**, and of who would ultimately benefit from a productive performance evaluation process.
- 3) **"Less prep, more presence"**⁹-- have reviews often and consistently, focus more on frequent check-ins or exchange of knowledge and perspective, including feedback (giving and receiving), and less on forms or formalities
- 4) **A focus on contribution to values, mission, or desired outcome**, and not solely on job activities.
- 5) **Emphasis on learning**, curiosity, and future orientation (e.g., feedforward), not on fault-finding, competition/positional posture, or lengthy past-oriented "root-cause" analysis.
- 6) **Critical people-centric work**, such as enabling people to align efforts to the organization's goals; providing guideposts for monitoring behavior and results, and for making real-time adjustments to maximize performance; and empowering people to remove barriers to their success.¹⁰

Recommendations

Leadership needs to agree on a way to evaluate how well we all — Board, Minister, CT, Staff—are serving the mission. Evolving realities invite a different approach to evaluate not only how well UUCF is realizing its mission but also the extent to which we grow through transformation.

Of the three options above, the PEC favors creating a process that reflects the hopes and needs of UUCF. UUCF is in a period of reflection and transition, where the existing vision and ends statements may no longer reflect the true needs and directions of the congregation. This option invites all parties to enter into a web of empowered yet interdependent relationships, rethink what is and what can be, find ways to move forward together in a direction that we own, and learn together.

In this section we will present (i) potential methods for moving forward and (ii) helpful immediate next steps. A few assumptions: first, we understand that any tool that will be used effectively must first be accepted and owned by the users. Second, time is required for any type of discernment and growth, and the leadership at this point has an opportunity to decide whether to engage in

⁹ *Emergent Strategy*, Adrienne Maree Brown, p.42.

¹⁰ "Getting Rid of Performance Ratings: Genius or Folly? A Debate", *Industrial and Organizational Psychology*, 9(2), pp 219–252 June 2016.

transformational or incremental change. Both methods have pros and cons, but either, pursued intentionally, will get us to where we want to be. The challenge is learning how to handle change effectively.

The Methods

Two methods come to mind. The transformational change method invites a radical redesign of the evaluation process and presents a different way to find alignment among entities and with the mission. It therefore requires more soul-searching, a change in thinking habits, and a spirit of experimentation.

This method would involve a workshop/retreat where Ministers, Board, CT, and Staff (and perhaps also lay leaders or others) collaborate to co-create a philosophy around evaluation and design an evaluation tool optimal for each entity. In other words, potentially, while all entities agree on a shared philosophy and on what to evaluate, they can devise their own how to evaluate (or be evaluated). A five-hour workshop/retreat, best facilitated by a party outside of the leadership group, should be sufficient to complete this agenda: ¹¹

Introductions, icebreaker, covenant for the workshop, workshop agenda

Taking Stock and Visioning (participants share their experiences and views)

- How did we get to where we are today?
- What should we be evaluated against? (and is that a valid anchor?)
- What do we want from an evaluation process?
- What would it take for us to get there?
- How might Emergent Strategy inform why, what, how we evaluate performance? (see [Attachment 4](#) for a potential application of Emergent Strategy principles)

Design a Better Process (participants will design their own process)

- Based on the elements discussed above, design the tool and process that reflect how you (Board, Minister, Staff, CT) would like to be evaluated
- What does an evaluation job well done look, sound, or feel like?
- Develop the process—how, when, by/with whom, based on what expectations, etc.

Action Planning (entities share their action plan)

- Commit to a timeline to finalize, test, implement, and evaluate the new process.

The incremental change method, on the other hand, assumes that the current process is valid if given a few “tweaks.” This is not a soul-searching process; however, small wins in this method can lead to further enlightenment and continuous adjustment if, again, the process is pursued intentionally.

This method would involve starting where we are with a few twists. It does not require a whole-body workshop/retreat, and each entity can perform its tasks independently. To be intentional,

¹¹ The PEC would be happy to facilitate or help identify a suitable facilitator.

however, all entities should agree to convene periodically as a whole body and share post-action reflections (it can be helpful to have a facilitator for this task).

At UUCF, the notion of a performance evaluation conversation already exists; the “tweak” is to hold this conversation on a more consistent basis across entities. Here is an example of action under the incremental change method:

All those who supervise or self-manage will hold confidential one-on-one meetings with their subordinates (or self) and have a conversation along these lines:

- (i) What aspects of your job did you find most gratifying this year?
- (ii) What aspects of your job are most challenging or frustrating?
- (iii) What are your hopes or aspirations for the coming year?
- (iv) What opportunities or constraints do you have now and/or envision going forward?
- (v) What questions do you have about your role and/or your priorities?
- (vi) What could help enhance your success, professional growth, and/or job satisfaction?

(People who are being evaluated should be given the opportunity to reflect on these questions before the meeting; supervisors should take notes so they can revisit the conversation and provide on-going support on a quarterly basis.)

Helpful Immediate Next Steps

1. The Minister and the Board to agree promptly which method to move forward with.
2. The staff to update promptly their job description to reflect current key components of the work, key expected work results, and key requirements in personal knowledge, skills, and abilities.

Conclusion

Coming together to decide on the performance evaluation question is one way we can re-energize our commitment to each other and to UUCF’s success. The PEC is looking forward to providing any additional details or assistance that helps advance performance evaluation at UUCF.

Articles

- HBR [Fixing Performance Appraisal Is About More than Ditching Annual Reviews](#)
- HBR [Let's Not Kill Performance Evaluations Yet](#)
- [Industrial and Organizational Psychology](#), "[Getting Rid of Performance Ratings: Genius or Folly? A Debate](#)", 9(2), pp 219–252 June 2016
- SHRM [Performance Management That Makes a Difference: An Evidence-Based Approach](#)

Books

- [Emergent Strategy](#), Adrienne Maree Brown, 2017.
- [Governance and Ministry](#), Dan Hotchkiss, 2009.

Websites

- Eric Geiger, "[5 Ways To Lead Effective and Inspiring Church Staff Reviews](#)"
- The Bridgespan Group, [Performance Assessment: Setting the Stage for an Effective Process](#)
- National Council of Nonprofits, [What's New in Employee Performance Evaluations?](#)

This survey contained 100 items assessing 9 dimensions of the Minister's performance, using a four-point rating scale (Strength, Satisfactory, Area of Growth, Weakness).

What we know:

- About 30 congregants responded to the survey, about half provided additional comments. In these comments, many respondents wrote that they did not understand certain items or that they questioned the validity of certain items, notably in the 7th dimension.

What we don't know:

- The origin of the survey (when constructed, by whom, etc.)
- How respondents were selected
- How results were shared with the Minister
- What change or actions were taken (by anyone) as a result of the feedback.

For confidentiality purposes, we will present below only the survey items, verbatim.

D1 LEADS WORSHIP

1. Invokes a sense of the sacred through inclusive liturgy and holistic ritual.
2. Selects elements that create a flow to the service relevant to the theme.
3. Creates a worship service that demonstrates multicultural and multi-generational sensitivity.
4. Collaborates with participants in designing the worship service.
5. Ensures that aesthetics enhance the worship experience.
6. Completes sermon preparation in an efficient manner (e.g. balances with other responsibilities.)
7. Delivers sermon that is emotionally fulfilling, spiritually nurturing and intellectually stimulating.
8. Inspires people with words and presence.
9. Engages full range of delivery skills (e.g. body movement, facial expressions and voice.)
10. Conveys ministerial authority and presence.
11. Trains volunteers in the elements and leadership of worship.
12. Ensures the application and continuity of the "freedom of the pulpit and pew" (e.g. responds constructively to those who challenge the tradition.)

D2 OFFICIATES RITES OF PASSAGE

1. Articulates UU theology and history relevant for life passages.
2. Prepares people for rites of passage (e.g. does pre-marital counseling, involves participants in memorial services).
3. Designs engaging and meaningful rites of passage.
4. Discerns role in acting as an agent of the state.
5. Designs rituals to welcome new members.

6. Creates celebrations of milestones (e.g. building projects, neighborhood alliances, social justice project launches, etc.).
7. Designs rituals to recognize and commission leaders and volunteers (military chaplains, Board members, significant volunteers).

D3 PROVIDES PASTORAL CARE AND PRESENCE

1. Provides pastoral visits (e.g. in hospital, hospice, home, prison, etc.).
2. Provides pastoral counseling that facilitates healing (e.g. grief work, trauma, addictions, sexuality concerns, hospice, chaplaincy, etc.).
3. Provides direct pastoral support to caregivers.
4. Maintains a consistent pastoral presence (e.g. through written notes, coffee hour, meetings, email, public events, etc.).
5. Addresses trauma in wider community through ritual, worship and communication networks.
6. Demonstrates multicultural and multi-generational competency in direct pastoral care.
7. Maintains professional boundary / presence when using various communication technologies (e.g. social media, email, Facebook, list serves).
8. Holds self and others accountable to professional boundaries.
9. Maintains ministerial role in the social life of the institution.
10. Maintains a plan and accountability system to address sexual attractions.
11. Manages lay pastoral care ministries (e.g. lay pastoral visitors, caring committees, grief groups, etc.).
12. Utilizes community/ UU resources to support the pastoral needs in one's ministry setting (e.g. local law enforcement, emergency personnel, addictions groups, sexual health, community health and welfare, nursing, etc.).

D4 ENCOURAGES SPIRITUAL DEVELOPMENT

1. Integrates religious education into all aspects of ministry (e.g. preaches on faith formation, leads reflection following social justice effort).
2. Directs religious education program for all ages.
3. Leads events and services that promote multicultural and multi-generational community and learning.
4. Integrates one's personal spiritual practice into one's ministry.
5. Provides direct spiritual guidance to support individual faith journeys.
6. Leads spiritual practice classes, retreats and pilgrimages.
7. Provides individuals with the tools to deconstruct, reframe and reconstruct religious traditions and language from their past.
8. Provides avenues for deepening Unitarian Universalist identity.

D5 DUTY 5: WITNESSES TO SOCIAL JUSTICE IN THE PUBLIC SQUARE

1. Inspires a prophetic response from the congregation or community to social justice issues (e.g. social service, public witness, advocacy).
2. Leads congregation or community to join coalitions to act on social issues.
3. Grounds the call to social justice work in Unitarian Universalist theologies.
4. Develops a communication plan employing diverse media to maximize social justice impact.

5. Connects social justice work to anti-oppressive, multi-cultural vision of the beloved community.
6. Promotes public dialogue across religious and values-based differences.

D6 LEADS ADMINISTRATION

1. Focuses the institution's resources and programs to fulfill the mission.
2. Guides the institution to implement its strategic plan.
3. Implements policies and procedures in compliance with local, state and federal laws.
4. Manages internal and external communications to enhance the mission of the institution.
5. Promotes the values of Unitarian Universalism through technology and the media.
6. Empowers professional and volunteer staff to work independently and collaboratively.
7. Evaluates performance of professional and lay staff based upon agreed upon work goals.
8. Ensures quality and continuity of programming in support of the mission.
9. Provides opportunities for leadership development of board members, committee members and other lay leaders.
10. Collaborates with governing board in implementing effective leadership of the institution.
11. Mediates conflicts with political savvy
12. Applies counter oppressive lens to leadership of institution.
13. Manages budgets, financial reports, and fiduciary responsibilities.
14. Integrates a theology of stewardship into the life of the institution.
15. Creates maintenance standards and building use policies (e.g. building use calendar, capital improvement budget item, etc.).
16. Implements membership systems (e.g. welcoming, recruiting, maintaining statistics, integrating new members).
17. Leads institution through a healthy transition process (e.g. retirement, staff changes, illness or death).
18. Leads interim processes, planning and/ or ministry.

D7 PURSUES PERSONAL RENEWAL AND PROFESSIONAL DEVELOPMENT

1. Makes time for family, friends and acquaintances.
2. Maintains intimate or meaningful relationships (friendships, love relationships) outside of the ministry setting.
3. Takes time off (e.g. vacations, study leave, Sabbath days, and sabbaticals).
4. Meets as needed with therapist/ counselor/ spiritual director.
5. Joins professional associations.
6. Attends UUMA gatherings (e.g. General and District Assemblies).
7. Maintains professional credentials and licenses.
8. Eats a healthy diet.
9. Visits doctors/ dentists regularly.
10. Engages in regular exercise.
11. Gets an adequate amount of sleep.
12. Engages in recreational, cultural and social activities.
13. Models spiritual, physical, sexual, and emotional health.
14. Manages financial security.

15. Ensures one's call is in alignment to the current ministry setting (e.g. knows when to seek new position).
16. Integrates new knowledge and skills into ministry.
17. Applies ongoing learning related to issues of privilege and power.

D8 DUTY 8: SERVES THE LARGER UNITARIAN UNIVERSALIST FAITH

1. Connects local congregation/ institution to regional, national, and international UU gatherings.
2. Promotes UU ordained ministry in a visible way (e.g. mentoring new ministers, educating laity about their roles in ordaining and installing ministers).
3. Establishes a culture of generosity and stewardship related to the larger faith.
4. Lives out the collegial spirit expressed in the UUMA covenant.
5. Leads collaborative staff teams in a spirit of shared ministry.
6. Promotes the work of community clergy and their affiliation with the congregation.
7. Follows UUMA process for addressing concerns when holding self and others accountable to professional standards (e.g. contact Good Officer).
8. Leads seminars, classes, workshops.

D9 LEADS THE FAITH INTO THE FUTURE

1. Champions a vision of a multicultural, multi-generational and diverse Unitarian Universalism.
2. Exhibits adaptive leadership abilities (e.g. Integrates learning, collaborates with groups outside UU, tolerates ambiguity).
3. Provides leadership opportunities for youth and young adults.
4. Expands the boundaries of Unitarian Universalist community through the use of evolving media technology (e.g. social media, virtual community, outreach missions, etc.).
5. Cultivates culture and practices of radical hospitality.
6. Promotes new ways of expressing Unitarian Universalism (e.g. house churches, revivals, cooperatives, second site, satellite congregations)
7. Prioritizes recruitment of new ministers.
8. Serves as a field education and/ or internship supervisor.
9. Mentors seminarians and new colleagues to develop their potential and foster retention.
10. Promotes Unitarian Universalist values through leadership in non-profit organizations and/ or interfaith alliances.
11. Inspires the institution to connect with and mentor other UU institutions.
12. Creates new revenue streams (e.g. new forms of membership, marketing of UU products).

Comparative Churches – Summary of Interviews

Attachment 3

<p>Unity Church-Unitarian (St. Paul, MN) Laura Park, Dir. of Unity Consulting, and congregant</p>	<p>Board and ministers monitor on a schedule (set out in a Governing Policies document) the issues that the Board pays attention to (e.g., quarterly for financial planning, monthly for program outcome, etc.). Board pays attention to advancement of Ends and compliance with Limitations. Ministers as heads of the Staff focus on finding ways to advance the Ends and stay in compliance with Limitations. At the end of each year, Board and ministers still sit down for a formal meeting to sum up all the data discussed during the year and talk about how to move ahead. Instrument is discussion of reports or other info that the Board requests or receives.</p>
<p>First Universalist Church of Minneapolis Rev. Jen Crow, Co-Senior Minister, via email</p>	<p>Board evaluates senior co-ministers on goals set at the beginning of the church year. Typically: annually and at mid-year. The mid-year check-in fell away this year. They focused their goals on adapting to all the change and keeping congregants cared for while we move toward our visionary goals. Many job descriptions were re-written to reflect changes in responsibilities.</p>
<p>Community Church of Chapel Hill Thom Belote, Senior Minister</p>	<p>The minister is evaluated annually using a method devised by the Committee on Ministry. (Board picks the COM from a list of candidates proposed by the minister.) For a couple of years they used a modified version of the Fulfilling the Promise survey (on the UUA website). Belote said that all church members should read the survey to give them a better idea what the minister does. Another year they asked the congregation a what-do-you-think-type question. One year they interviewed a sample of 25 members. Last year they asked the entire congregation, “How are we doing in the pandemic?” They received 70 responses (out of 420 members). Usually they receive about 30 responses to a congregational survey. Belote likes “juicy” questions, e.g., “How is your spiritual journey enriched by the church?” or “How are you fitting in?” The COM summarizes the collected data. Surveys are not anonymous.</p>
<p>Oak Ridge UU Jake Morrill, Minister</p>	<p>Early on there was a congregational survey to evaluate the minister, more recently two Board evaluations of the minister, but nothing currently. They have talked about initiating a ministerial evaluation process, but it always falls to the bottom of the pile.</p>

<p>First Unitarian Church of Portland (OR) Bill Sinkford, Senior Minister</p>	<p>The Board does a yearly evaluation not solely of the senior minister but of the “ministry” of the church. Performance dimensions are based on the eight components of the mission statement, and the evaluation assesses the extent to which the executive team is moving the church toward its mission-based goals.</p> <p>The evaluation process includes a congregational survey, designed to flag areas of concern. (Participation varies from 250-300, when things are going well to about 500 when there are issues troubling congregants.) The Board governance team, a subset of the Board, writes the annual report on the ministry as they see it. It is anecdotal and descriptive, as well as numerical, containing survey results and statistics on membership, RE, etc.</p>
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**An Application of the Emergent Strategy Principles
to Performance Evaluation**
(Emergent Strategy, pp. 41-42)

Attachment 4

Emergent Strategy Principles	Potential Questions for Reflection
Small is good, small is all. (The large is a reflection of the small.)	<ul style="list-style-type: none"> - What are some “small things” that are helping UUCF meet the current moment? - What are the small things we/you are paying attention to right now that we/you feel are helping UUCF meet the current moment?
Change is constant. (Be like water.)	<ul style="list-style-type: none"> - What have we/you noticed is changing within our congregation? - In what ways did we/you adapt to change this year? - What emerging needs do we/you see? How does that translate into what we/you should be doing? - What may no longer be a serving UUCF?
There is always enough time for the right work.	<ul style="list-style-type: none"> - What did we spend the most time on this year? - What aspects of UUCF most deserve our/your focused attention? - Did our use of time match our priorities and our ideas about “the right work”? - What is possible so that we can focus on the right work?
There is a conversation in the room that only these people at this moment can have. Find it.	<ul style="list-style-type: none"> -What conversations did we have this year that drew on the unique perspectives and experiences of the people in the room? - What are some of the critical conversations we need to have in the coming year? - Whom shall we include in the conversations?
Never a failure, always a lesson.	<ul style="list-style-type: none"> - What lessons have we/you learned this year? - How can we/you incorporate those lessons into our/your work over the coming year?
Trust the People. (If you trust the people, they become trustworthy.)	<ul style="list-style-type: none"> - In what ways did we/you foster trust this year? - In what ways have we/you seen trust grow within the congregation? - Where do we/you need to foster more trust?

Emergent Strategy Principles	Potential Questions for Reflection
<p>Move at the speed of trust. Focus on critical connections more than critical mass— build the resilience by building the relationships.</p>	<ul style="list-style-type: none"> - In what ways did we build trusting relationships among ourselves and within the congregation this year? - What relationships are you building? - What connections would be most important to the health of our congregation in the coming year?
<p>Less prep, more presence.</p>	<ul style="list-style-type: none"> - Are there aspects of how the board/UUCF/the Ministry operates that are too bogged down in process?
<p>What you pay attention to grows.</p>	<ul style="list-style-type: none"> - What did we pay attention to this year, and what were the results? - What needs our attention next year, in hope of what result? - What are you paying attention to these days? - Are there aspects of UUCF and/or the board/ministry that would benefit from more attention?