

Assessments

This packet will be used in Shaping the Parish.

Initial Learning Objectives:

1. To become acquainted with a variety of surveys and assessments.
2. To explore the use of assessments at various times of the year and to address a range of issues.

Possible learning objectives in other sessions:

To increase our understanding of how to use assessments in relation to – a) theories and models (for strategic action and to reinforce helpful theories and models), b) other strategic considerations (working from gifts/strengths, when addressing weakness and blindspots is needed, etc.)

All the assessments in this packet can be found at Shaping the Parish Resources at www.orderoftheascension.org

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Examples of collated assessment results

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Purposes of a Parish Church Assessment

There are three intrinsic purposes of any parish church. We see them as:

1. The worship of God
2. The formation of the People of God for the sake of the world
3. Being a sanctifying presence in the broader community

A. Overall satisfaction with parish life and work

Very Low						Very High
1	2	3	4	5	6	

B. The worship of God

1. The parish has a clear approach and culture in its approach to worship.

Not at all						Very much so
1	2	3	4	5	6	

2. The parish expresses the Prayer Book Pattern or Threefold Rule of Prayer in its worship.

Not at all						Very much so
1	2	3	4	5	6	

3. Overall satisfaction with parish leadership in regard to worship.

Very Low						Very High
1	2	3	4	5	6	

4. Overall satisfaction with the parishioner's willingness and ability to enter into worship.

Very Low						Very High
1	2	3	4	5	6	

Comments on worship

C. The formation of the People of God for the sake of the world

1. The parish offers an *adequate level of training and coaching* in the spiritual life to assist members toward increased spiritual and emotional maturity.

Not at all						Very much so
1	2	3	4	5	6	

2. The parish’s life of worship nurtures an apostolic climate while being accessible to most parishioners. (Note: This is about formation into maturity through participation in the worship of the parish.)

Not at all			Very much so		
1	2	3	4	5	6

Comments on formation

D. Being a sanctifying presence in the broader community.

1. “The primary sanctifying relationship of any parish is through the presence of the baptized members scattered into the arenas of daily life—family and friends, workplace, and civic life.” *Our parish emphasizes that in tangible ways* (e.g., in sermons, classes, website, etc.)

Not at all			Very much so		
1	2	3	4	5	6

2. The parish has a defined and sustainable relationship with a community of people external to the worshipping community (e.g., a neighborhood, the entire town/city or a vocational community such as the performing arts or medical practitioners).

Not at all			Very much so		
1	2	3	4	5	6

3. That relationship has involved a great deal of listening. We got to know that particular community, listened, and then found ways in which we could be in relationship.

Not at all			Very much so		
1	2	3	4	5	6

Comments on sanctifying presence

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For background on the three purposes of a parish church see Chapter One, *An Energy Not Its Own: Three cycles of parish life and the purposes of the parish church*, Michelle Heyne & Robert Gallagher, Ascension Press, 2023.

ASSESSMENT OF PARISH LIFE AND MINISTRY
The Christian Life Model

1. Overall satisfaction with Parish Life and Ministry

I am very dissatisfied	1	2	3	4	5	6	I am very satisfied
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2. *Worship* - How well we worship as a community. Equipping people for participation in the Eucharist and the use of the Daily Office and personal devotions. Climate: issues of style, beauty, flow; appropriate use of the Holy Eucharist and Daily Office; teaching and coaching the congregation for prayer life and participation in liturgy; functioning of guilds and individuals that play special roles; schedule; participation, etc.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4	5	6	I am very satisfied
-------------------------------	---	---	---	---	---	---	----------------------------

b. *Weaknesses*

c. *Strengths*

3. *Doctrine* - The parish's awareness of what has authority in the Christian Life. Competence as a congregation and individuals in relating those sources of authority to decision-making

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4	5	6	I am very satisfied
-------------------------------	---	---	---	---	---	---	----------------------------

b. *Weaknesses*

c. *Strengths*

4. *Action* - Corporate action of service, evangelization, stewardship; lay members' awareness of their apostolate in the workplace, family, civic life, church. Parish's dealing with the tension between the parish's corporate ministries and the individual's apostolate in daily life.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4	5	6	I am very satisfied
-------------------------------	---	---	---	---	---	---	----------------------------

b. *Weaknesses*

c. *Strengths*

5. *Oversight* - Competence and commitment of leaders , clergy and lay, for leadership and management; building community; and deepening the congregation’s spiritual life; leaders serving, guiding, leading and managing the parish into an appropriate and full living of the Christian Life: bringing and preserving a proper order/shape in the parish’s life; methods for reflecting, discerning and planning in parish life; lay-clergy relationships; sense of direction, etc.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4	5	6	I am very satisfied
-------------------------------	---	---	---	---	---	---	----------------------------

b. *Weaknesses*

c. *Strengths*

6. *Other Comments*

CLERGY ASSESSMENT

A. Steps

1. For use after an overall parish assessment based on the same model.
2. Members of vestry complete assessment form. Priest fills out form for self-assessment.
3. All forms are returned to the Rector or Vicar for review and reflection. (If desired by the priest, this could be done with the Wardens.)
4. Rector or Vicar makes a brief response to the Vestry, i.e., “You seem pleased with. . .”; “Some concern was expressed about. . .”; “I see myself giving special attention to. . .”

B. Please write comments in each of the following areas

	Like about your ministry in this parish	Concerns I have	Things I wish you would consider doing differently
Worship			
Doctrine			
Action			
Oversight			

C. Other Comments

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Some Key Factors

Can be found in Shaping the Parish Resources www.orderoftheascension.org as “Key Factors (2021)” in Assessments section.

Please assess your parish using these factors:

	Low				High
A. Overall satisfaction with parish life & ministry	1	2	3	4	5
B. Effectively engaging the three purposes of a parish church in a manner fitting parish size and charism Overall rating	1	2	3	4	5
1. The worship of God – fullest Prayer Book Pattern is a Sunday Eucharist, a public Daily Office (daily), and equipping members for personal devotions (especially reflection)	1	2	3	4	5
1 a. Primary - Great Sunday Liturgy and social time	1	2	3	4	5
2. The formation of the People of God – Fullest expression is a strong adult process in the tradition of the Episcopal Church - the total impact of Liturgy, spiritual guidance, overall parish climate, programs. At least 1/4 of those present on Sunday are very competent in the spiritual practices of the Episcopal Church.	1	2	3	4	5
3. Having a sanctifying relationship with the broader community.	1	2	3	4	5
C. Vibrant - The extent to which parish life is vibrant, creates a "buzz" that excites the congregation and spills over to the wider community, an attractive energy	1	2	3	4	5
D. Alignment - The elements of parish life are mostly in alignment: income-expenses, the energy, and funds to carry out the vision we have; liturgical space or number of services to match the number of attendees, and so on.	1	2	3	4	5

Your comments:

PARISH ASSESSMENT WORKSHEET

This assessment can be found in the Shaping the Parish Resources as “Parish Assessment - based on Organizational Diagnosis (There is a description of the model in Finding God in All Things, “Organizational Diagnosis: Six Primary Elements of the System”)

Please circle the number that comes closest to how you would rate each area mentioned in the question.

	Low					High
A. Overall						
1. My overall satisfaction with the how the parish functions	1	2	3	4	5	6
2. My overall satisfaction with my own role in the parish.	1	2	3	4	5	6
B. Primary Task (what a parish church is for)						
Low High						
1. Level of agreement among Rector, Vestry and members about the parish’s primary task	1	2	3	4	5	6
2. Ability of the leadership (Rector/Vestry) to stay focused on primary task	1	2	3	4	5	6
3. The parish’s worship life (community worship & equipping people for daily prayer life)	1	2	3	4	5	6
4. The parish’s education —especially education that helps members make connections between our faith and how we live their lives.	1	2	3	4	5	6
5. The parish’s service to others	1	2	3	4	5	6
6. The parish’s stewardship	1	2	3	4	5	6
7. The parish’s evangelism (attracting others to the good news in Christ)	1	2	3	4	5	6
8. The parish’s ability to innovate , finding better ways to do what it does	1	2	3	4	5	6
C. Vision						
Low High						
1. Sense of direction (expressed in vision, strategic plan, or just in practice) for the organization	1	2	3	4	5	6
2. Clarity about our core values	1	2	3	4	5	6
3. "Ownership" of direction by leadership (Rector & Vestry)	1	2	3	4	5	6
4. "Ownership" of direction among the members	1	2	3	4	5	6

D. Dynamics	Low					High
1. Level of trust among the members	1	2	3	4	5	6
2. Level of trust between leadership (Vestry and Rector) and the members	1	2	3	4	5	6
3. Level of trust between Rector and the members.	1	2	3	4	5	6
4. Level of trust between the Rector and the Vestry	1	2	3	4	5	6
5. How well the parish manages the dynamics of change and stability (e.g., changing when we need to change, maintaining stability when needed)	1	2	3	4	5	6

E. People	Low					High
1. Members' commitment to managing and developing their spiritual life	1	2	3	4	5	6
2. Members' skill in managing and developing their spiritual life	1	2	3	4	5	6
3. Commitment of the leadership (Vestry & Rector) for its work	1	2	3	4	5	6
4. Skills of the leadership (Vestry & Rector) for its work	1	2	3	4	5	6
5. How effectively the leadership (Vestry & Rector) makes use of different working styles among its members	1	2	3	4	5	6

F. Structures and Processes	Low					High
1. How adequate and appropriate the resources are for the Rector to do his work (e.g., technology, space, etc.)	1	2	3	4	5	6
2. Members adequately participate in the information flow, problem solving and decision making in the parish	1	2	3	4	5	6
4. Leadership (Vestry & Rector) effectively and adequately participates in information flow, problem solving and decision making	1	2	3	4	5	6
5. How well the leadership deals with differences, disagreements, conflict	1	2	3	4	5	6
6. How well the parish deals with differences, disagreements, conflict	1	2	3	4	5	6
7. The way the parish is structured (committees, groups etc.) works effectively and efficiently to get things done	1	2	3	4	5	6

8. There are **adequate links and cooperation** among individuals, committees and groups in the parish. 1 2 3 4 5 6

G. Leadership Low High

1. The **leadership** (Rector & Vestry) is able to get the routine work done while also paying attention to strategic issues (e.g., long term or systemic issues, capacity building) 1 2 3 4 5 6

2. **Leadership** (Rector & Vestry) is **in adequate touch** with what is happening in the whole system 1 2 3 4 5 6

3. **Leadership** (Rector & Vestry) is able to effectively participate in **setting the strategic direction** for organization

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LIKES-CONCERNS-WISHES ASSESSMENT

1. Satisfaction with Parish Life and Ministry

I am very dissatisfied	1	2	3	4	5	6	I am very satisfied
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2. Offer your thoughts about the parish’s functioning using the categories below.

LIKES What you like/affirm about the parish’s work and life.	CONCERNS Your concerns about the parish’s life and work.	WISHES Your wishes about what the parish might do to improve its work and life.

3. **Circle** the items, in each category, that you see as most important to the long term health of the organization. © Robert A. Gallagher, 1992

Vestry Self-Assessment

This is an opportunity for the vestry to reflect on several critical aspects of its life and work.

The life of the parish is for the sanctification and formation of people and for the glorification of God in worship and common life.

Steps:

This will be most effective if done in one session. However if need be take two sessions. For the purposes of this assessment we are using the terms vestry and parish broadly to identify the lay leadership body and the local church regardless of the terms used in any particular diocese.

1. Prayer:

O God, who wonderfully created, and yet more wonderfully restored, the dignity of human nature: Grant that we may share the divine life of him who humbled himself to share our humanity, you Son Jesus Christ; who lives and reigns with you, in the unity of the Holy Spirit, one God, for ever and ever. *Amen.*

2. Each vestry member completes the self-assessment.

3. Record the results in front of the group on newsprint or white board

4. Discussion

- Any surprises?
- Areas of vestry strength
- Areas of vestry weakness, blind spots

5. Next steps (if any)

Vestry Self-Assessment

A. Your participation in some of the central activities of a parish church

(Note: This item assumes that it is essential that members of the vestry understand the “business” of a parish church if they are to serve faithfully and effectively. Also that such an understanding is both shaped by and expressed in certain activities.)

1. Sunday Eucharist Attendance (circle one)

About 1/4 of the time	Half the time	$\frac{3}{4}$ of the time	Just about every Sunday
-----------------------	---------------	---------------------------	-------------------------

2. Sunday Eucharist - My ability to participate (Circle the number that is closest to your experience)

I am frequently confused and uncertain about how to participate		I can “flow” with it. I mostly don’t need a Prayer Book or leaflet.
1	2	3
		4
		5

3. Participating in the Daily Prayers of the Church [Daily Office] Doing the Office in some form on my own or with others

Never	Only when offered at a meeting or retreat	Sporadically or at during some season(s) of the church year	Most days
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4. Knowing how to do the Daily Office

I have no idea.

I understand how to use it from the Prayer Book and ways to innovate the use

1

2

3

4

5

5. Disciplined ways of reflecting - Having ways that work for me

Grounding/centering yourself so you can reflect. The spiritual practice of “pondering” and seeking God’s presence in the people, circumstances and things of life. Practices that connect daily life to God.

I don’t have ways that work for me

I have ways that are effective for me

1

2

3

4

5

B. Team work

1. The vestry works effectively as a team: members are reliable, responsive, listen to others and offer opinions and ideas, and respect the feelings of others.

Low team effectiveness

High team effectiveness

1

2

3

4

5

2. The vestry as a whole works well with the Rector/Vicar

Poor working relationship

Excellent working relationship

1

2

3

4

5

C. Engaging the vestry’s work

We recognize that vestries vary in how they understand their work. Some are more involved with setting overall parish direction, others more focused on property and finances. All vestries are responsible for oversight of parish finances and property.

1. How we see our role in the parish

Day-to-day management of parish affairs

Primarily the oversight of property and finances

Setting and monitoring overall direction

Strategic management – helping navigate the parish toward long term goals

2. The vestry effectively engages its work

Not really Very much so
1 2 3 4 5

3. We understand that the Rector/vicar shares in the vestry's task, has a responsibility for the oversight of all aspects of parish life, and also has several areas of independent authority and responsibility (specifically regarding worship/liturgy)

Does not match my understanding at all Yes, this is what I understand
1 2 3 4 5

4. We have the basic skills and knowledge needed to oversee parish finances and property.

Not at all adequate Very much so
1 2 3 4 5

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Liturgical Options

Three factors came to mind as I did this.

1. What liturgy might attract/serve a group of people?
2. What form of liturgy would attract enough people from the existing congregation to provide a base for the new one?
3. What is the rector willing to do? We don't assume that priests are all willing to preside at all types of celebrations. A new liturgy will not work if the rector isn't fully invested.

New Sunday Mass Options

1. A traditional early morning Mass (7:30, 8:00 or 8:30 a.m.). No music, about 40 minutes long. Could be Rite One or not.

a. Your sense of whether this would appeal to a group we might reach (circle one)

Not likely

Very Likely

1

2

3

4

5

b. Your possible participation (circle one)

Never

Rarely

On occasion

Frequently

2. A contemplative Mass (morning). A primary Eucharist in the morning (9:00, 9:30, 10:00 a.m.) Periods of silence before beginning, after a reading, after the sermon, and so on. With music – ancient hymns, some hymns that can be done from memory, possibly a cantor or two. Incense though possibly use a pot that burns off to the side. About one hour.

a. Your sense of whether this would appeal to a group we might reach (circle one)

Not likely

Very Likely

1

2

3

4

5

b. Your possible participation (circle one)

Never

Rarely

On occasion

Frequently

3. A contemplative Mass (evening). A Eucharist Sunday evening (5:30, 6:00, 6:30 p.m.) Periods of silence before beginning, after a reading, after the sermon, and so on. With music – ancient hymns, some hymns that can be done from memory, possibly a cantor or two. Incense though possibly use a pot that burns off to the side. About one hour.

a. Your sense of whether this would appeal to a group we might reach (circle one)

Not likely

Very Likely

1

2

3

4

5

b. Your possible participation (circle one)

Never

Rarely

On occasion

Frequently

4. A family Eucharist. Hymns, no cantor or choir. Hymns that are either easy to sing or very familiar in Episcopal Church (helping incorporation in the larger). About one hour. Usually no incense, possibly use on major days so there is some integration with overall parish tradition. Not a kiddy liturgy but easier for children. Ceremony much as now. This is fairly common approach when Anglo Catholic parishes add a Sunday mass. (9:00 am if current mass is done at 10:30; 9:30 if current mass is done at 11:00 am OR could shift and do current mass earlier)

a. *Your sense of whether this would appeal to a group we might reach (circle one)*

Not likely

Very Likely

1

2

3

4

5

b. *Your possible participation (circle one)*

Never

Rarely

On occasion

Frequently

5. “Experimental” masses. Not the best name for this but it’s often the initial language used as parishes explore. Could be a particular style – emergent church (though style is not always same), jazz mass, mass oriented to the arts, St. Gregory’s of Nyssa S.F. type of mass. About 1 hour but more as required. Could be anytime on Sunday.

a. *Your sense of whether this would appeal to a group we might reach (circle one)*

Not likely

Very Likely

1

2

3

4

5

b. *Your possible participation (circle one)*

Never

Rarely

On occasion

Frequently

6. Ancient-Modern -- Using current Mass as the starting place for serving new population. Increase liturgical grace, beauty and flow—for example, more flowing use of ceremony, purchase full vestments sets (Celebrant, deacon, sub-deacon), carefully train all servers, less hesitation with incense (yet without overdoing it), and so on. This would mean beginning another Mass that

a. *Your sense of whether this would appeal to a group we might reach (circle one)*

Not likely

Very Likely

1

2

3

4

5

b. *Your possible participation (circle one)*

Never

Rarely

On occasion

Frequently

Possible need to change liturgical space

Several of these options would require changes in the space if they are to be done well.

A. The simplest and least disruptive change that might work with any of the options would be to:

1) replace the first 3 – 4 rows of pews with cathedral chairs, 2) have an free standing altar that can be moved into the current choir aisle (maybe something that is solid but collapsible and could have a full frontal), 3) In some of the options have the ministers of the altar in seats behind the free standing altar, 4) choir might need to move back one pew in choir space.

Openness to this if the option called for it: No Maybe Yes

B. If we were doing #6 and maybe some others – move the Mary Shrine to the front right so it is more accessible for use before and after masses.

Openness to this: No Maybe Yes

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Eucharistic Assessment

A. Your Attendance at the Sunday Eucharist (circle one)

About 1/4 of the time Half the time 3/4 of the time Just about every Sunday

B. Your Spiritual Discipline – I have a spiritual discipline grounded in the church’s tradition

No Very much so
 1 2 3 4 5

Sunday Eucharist

1. Member’s ability to participate

Most are frequently confused and uncertain about how to participate.

1

2

3

4

A critical mass of people “flow” with it. Mostly don’t need a Prayer Book or leaflet.

5

2. Congregation or audience

We are like an audience. We wait for instructions and prompting before participating.

1

2

3

4

We are a congregation – competent in the liturgy. There are no instructions during the Eucharist.

5

3. Competence of liturgical assistants – We effectively equip those with a special role in the celebration, e.g., cantor, lector, ministers of the altar, acolyte.

We do a poor job

1

2

3

4

Done well

5

4. Liturgical presence of the presiding priest – A sacramental presence. The person and the role are held together. The priest’s personality doesn’t overwhelm the role; the role doesn’t make the personality disappear. Graceful, attentive.

Awful

1

2

3

4

Done well

5

5. The liturgy is usually well done. It has the structure, climate and rhythm of Apostolic faith. It requires some competence. It has the potential to catch people up in something beyond themselves; to feed wonder and awe. The congregation knows how to participate without prompting.

Not at all
1 2 3 4 Very much so
5

6. The preaching usually has a good pace, style, sense of ease, and length. It connects the tradition with life. There is an authenticity about the preacher and what is said.

Not at all
1 2 3 4 Very much so
5

7. The Liturgical Space is graceful, not cluttered; is beautiful; fits the congregation's size and style of worship. Those serving at the altar can move about without awkwardness.

Not at all
1 2 3 4 Very much so
5

8. Climate: Orient things toward the participation of the spiritually mature. This needs to feel like the heavenly banquet, a taste of Glory for those who are competent in the ways of the liturgy and the church's spirituality. Look for beauty, reverence, the experience of a grounded, calm community rather than of busyness and rush. Solemn but not fussy.

Not at all
1 2 3 4 Very much so
5

9. Liturgical presence of those serving at the altar: We live in the paradox of seeking to do things perfectly while not getting agitated about mistakes; of being confident and self-aware without being arrogant or fastidious.

Not at all
1 2 3 4 Very much so
5

10. The liturgical space: is graceful, uncluttered and beautiful; fits the congregation's size and style of worship. The space needs to allow those serving at the altar and in the congregation to move about without awkwardness. It needs to manage the polarity of expressing stability, that this is "sacred space" with a degree of flexibility.

Not at all
1 2 3 4 Very much so
5

11. Pattern: Liturgy has a shape. Liturgy is a movement from one place to another. Our understanding of and conformity with that shape and direction allows people to participate. It also offers a deeper, more rewarding experience.

Not at all
1 2 3 4 Very much so
5

12. Flow: Allowing people to have the experience of being immersed in the liturgical event. It involves an opportunity for depth and focus, of an involvement in which there is a lack of self-consciousness, and a sense of personal ownership provided because the person has the competencies needed to fully engage the experience. The person is carried along as in the current of a stream. Flow is enabled by stability in liturgical practices, the climate established by the space and liturgical ministers, and developing the competency of the congregation.

Not at all
1 **2** **3** **4** Very much so
5

13. Congruence: Our liturgy has aesthetical harmony. There's a reliable relationship of elements. The person may have a sense of oneness with self, others, and God. Our participation allows for an awareness of the 1) liturgical action, 2) others in the congregation, and 3) the sacred space. Our environment isn't rushed and anxious before the beginning of the Eucharist.

Not at all
1 **2** **3** **4** Very much so
5

14. Proportion: The relationship among elements seems in accord, in balance. The sermon or the music doesn't have the effect of overwhelming the rest. The altar, font, and lectern fit one another and the scale of the total space. The ceremony works with the space.

Not at all
1 **2** **3** **4** Very much so
5

15. Appropriateness: What is done fits the setting, occasion, and people gathered. There's not an excessive degree of interpersonal intimacy, tilting too much toward extroversion or introversion, and forcing physical activity that a significant number of people find difficult.

Not at all
1 **2** **3** **4** Very much so
5

16. Acceptance & Accessibility: There is practical judgment and a sense of proportion regarding the polarities of maintaining ancient liturgical tradition and making space for people with various difficulties related to participation.

Not at all
1 **2** **3** **4** Very much so
5

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Assessing the Parish's Spiritual Practices

Your name: _____

A. Your Attendance at the Sunday Eucharist (circle one)

About 1/4 of the time	Half the time	¾ of the time	Just about every Sunday
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B. Your Spiritual Discipline—I have a spiritual discipline grounded in the church's tradition

No				Very much so
1	2	3	4	5

OVERALL

1. The degree of awareness of spiritual practices and proficiency among regular attendees (circle one)

No idea	15% of the adult average Sunday attendees are aware of the core spiritual practices and few are proficient	40% of the adult average Sunday attendees are aware of the core spiritual practices and 5% are proficient	80% of the adult average Sunday attendees are aware of the core spiritual practices and 30% are proficient
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SUNDAY EUCHARIST¹

2. Members' ability to participate

Most are frequently confused and uncertain about how to participate.				A critical mass of people "flow" with it. Mostly don't need a Prayer Book or leaflet.
1	2	3	4	5

3. Congregation or audience

¹ There is a longer Eucharistic Assessment available in Robert Gallagher's *Eucharistic Spirituality: From Audience to Congregation*, Ascension Press, 2011

We are like an audience. We wait for instructions and prompting before participating.				We are a congregation—competent in the liturgy. There are no instructions during the Eucharist.	
1	2	3	4	5	

4. Competence of liturgical assistants—We effectively equip those with a special role in the celebration, e.g., cantor, lector, ministers of the altar, acolyte.

We do a poor job				Done well	
1	2	3	4	5	

5. Liturgical presence of the presiding priest—A sacramental presence. The person and the role are held together. The priest’s personality doesn’t overwhelm the role; the role doesn’t make the personality disappear. Graceful, attentive.

Awful				Done well	
1	2	3	4	5	

6. The liturgy is usually well done. It has the structure, climate and rhythm of Apostolic faith. It requires some competence. It has the potential to catch people up in something beyond themselves; to feed wonder and awe. The congregation knows how to participate without prompting.

Not at all				Very much so	
1	2	3	4	5	

7. The preaching usually has a good pace, style, sense of ease, and length. It connects the tradition with life. There is an authenticity about the preacher and what is said.

Not at all				Very much so	
1	2	3	4	5	

8. The Liturgical Space is graceful, not cluttered; is beautiful; fits the congregation’s size and style of worship. Those serving at the altar can move about without awkwardness.

Not at all				Very much so	
1	2	3	4	5	

9. The Holy Eucharist is celebrated on enough occasions, at times each week as to allow people with a

variety of schedules to find one that might serve as their weekly spiritual practice.

Not at all				Very much so
1	2	3	4	5

PARTICIPATING IN THE DAILY PRAYERS OF THE CHURCH

10. The parish offers a **public form of the Daily Office**

Never	Sporadically or at during some season(s) of the church year	A few days each week	Most days of the week
-------	---	----------------------	-----------------------

11. Those **participating in officiating** at the parish’s public offering of the Daily Office are:

There is no public offering of the Office			Both clergy and lay members officiate on a regular basis	
1	2	3	4	5

12. The **parish equips and supports** parishioners in saying the Daily Prayer of the Church on their own in the course of daily life by offering training and guidance.

Not at all			Regular and frequent training and guidance are provided	
1	2	3	4	5

13. 15 – 20% of those regularly attending a weekly Eucharist **say the Office in some form.**

Few or none in the parish say the Office			At least that many	
1	2	3	4	5

DISCIPLINED WAYS OF REFLECTING

14. The **parish provides members assistance** in identifying and maintaining ways of being reflective.

Not at all			Regularly	
1	2	3	4	5

15. The parish **engages in reflective processes**, ways of listening to and learning from its own life as a community.

Not at all				Regularly
1	2	3	4	5

16. The parish’s reflective processes have helped it **become more flexible and adaptive**.

Not at all				Very much so
1	2	3	4	5

PARTICIPATING IN THE PARISH COMMUNITY

17. **This is a parish community** in which people are free to be themselves; to speak and listen fully and authentically. In which differences are accepted (we can fight with those we love). In which we can make decisions and solve the problems we face.

Not at all				Very much so
1	2	3	4	5

18. **Connection with people.**

Most don’t know anyone well				Regular attendees usually know a number of people and have a few friends in the parish
1	2	3	4	5

19. **Participation in parish social life** is easy for members to engage. The climate is one of acceptance whether you participate or not.

Not at all				Very much so
1	2	3	4	5

SERVICE

20. **Service in Daily Life** (within our friendships, families, work, and civic life):

Few have a clear understanding of how they serve in daily life				Most regular attendees are very clear about service in daily life
1	2	3	4	5

21. As a parish community we have a form of serving beyond the parish's needs that is **sustainable and in proportion** to what we can manage.

We are overwhelmed by it				It's easily managed
1	2	3	4	5

22. Our parish's corporate service ministry **fits our gifts** as a parish.

Not a fit				Fits us
1	2	3	4	5

The Process of Change

The parish can also model an approach to change or experimentation and learning from experience. It can teach methods that allow people to face change

23. An adult foundations course is offered regularly and frequently in the parish.

Never				Regular & frequent
1	2	3	4	5

24. The parish has a climate and an approach to the spiritual life that encourages **experimentation and the engagement** of the tradition.

Not the case				Very much so
1	2	3	4	5

. Copyright Robert A Gallagher & Michelle Heyne 2010

Found in: *In Your Holy Spirit: Traditional Spiritual Practices in Today's Christian Life*, 2011 by Michelle Heyne and *In Your Holy Spirit: Shaping the Parish through Spiritual Practice*, by Robert Gallagher, 2011

Incorporation Process Assessment

This assessment looks at the incorporation process as three phases: welcoming, orienting, and integrating. They are distinct phases as well as ongoing, overlapping processes.

The bias of this assessment is that parishes need a way that incorporates people that increases the likelihood that people will become mature, adult Christians in this tradition of the Church.

Welcoming & First Contact

These very initial encounters provide the visitor with an opportunity to experience what being part of this community will be like.

1. The parish has a **defined parish culture**. We know who we are as a community; we have ways of being and doing that are widely “owned” in the parish. We have a sense of identity and integrity. [Note: Without the boundaries of a defined parish culture we have nothing to welcome people into]

Not at all				Very much so
1	2	3	4	5

2. Visitors are **invited to find a space** in which they make themselves at home. The tone is receptive and open rather than impatient, intrusive or passive. It is an invitation to join a community with worthy way of life; a life in which the person may be changed.

Not at all				Very much so
1	2	3	4	5

3. The visitors' first impression is usually of a **grounded, calm community** rather than of busyness and rush. The **focus is around the Eucharist and coffee hour**. There are usually no meetings or adult education activities competing for attention.

Not at all				Very much so
1	2	3	4	5

4. On entering there is **just enough information** handed a visitor to allow making sense of how things are about to be done (information on the parish is available but not pushed upon people). An example of “just enough information” is the Sunday bulletin and a sheet saying:

- Participating in the Worship: You are welcome to enter into the Liturgy or if you prefer to allow the congregation to carry you as you become familiar with the flow and pattern.
- *Children*: Children may stay with their family during the Eucharist or participate in the child care (located at ____) or church school (located at __)
- *Communion*: If you would like to receive communion
- *Coffee hour* - There is a time of community and social contact just after the Eucharist. Please join us. (Give directions to the location)

Not at all				Very much so
1	2	3	4	5

5. **The liturgy is usually well done.** It has the structure, climate and rhythm of Apostolic faith. It requires some competence. It has the potential to catch people up in something beyond themselves; to feed wonder and awe. The congregation knows how to participate without prompting.

Not at all 1 2 3 4 **Very much so**
5

6. The **preaching** usually has a good pace, style, sense of ease, and length. It connects the tradition with life. There is an authenticity about the preacher and what is said.

Not at all 1 2 3 4 **Very much so**
5

7. The **Liturgical Space** is graceful, not cluttered; is beautiful; fits the congregation's size and style of worship. Those serving at the altar can move about without awkwardness.

Not at all 1 2 3 4 **Very much so**
5

8. We have a way of **getting visitor contact information** that is easy for the visitor to respond to (for example, asking for the minimal amount of information needed for a next step – name, e-mail, phone). The process is quick and easy, for example – we don't bother to ask for information that fits a later stage - about participation in parish groups. [Note: If the person gives you basic contact information they know you'll be in contact]

Not at all 1 2 3 4 **Very much so**
5

9. We are good at **getting visitors to come to coffee hour.**

Not at all 1 2 3 4 **Very much so**
5

10. The **coffee hour** is well attended, lively; people appear to be glad to be together. The beverages and food served is at least as good as what people would receive in a successful coffee shop.

Not at all 1 2 3 4 **Very much so**
5

11. We provide **attention to visitors**, and newer attendees, by making sure that they are not abandoned. We have lots of nametags available for members and visitors to put on. There's a person or two who accept responsibility for this (they have the gift and some training in hospitality and listening). [Note: A coffee hour is primarily about the community's need for connection. It's a mostly informal time allowing people to wander the room and talk with a variety of people. That needs to be protected while visitors are paid attention to]

Not at all 1 2 3 4 **Very much so**
5

12. The **priest makes contact** with visitors at coffee hour and follows up with the person within the week.

Not at all 1 2 3 4 Very much so 5

13. Other:

Not at all 1 2 3 4 Very much so 5

14. Other:

Not at all 1 2 3 4 Very much so 5

Orienting

An opportunity, in a very basic and initial manner, to become familiar with and connected to the people and ways of this parish. The person is trying to get a sense of whether he or she will fit in here. Early on they begin to explore a place within the community and to develop the core competencies needed to live in the community. This is the beginning of the parish's effort to orient people for a fuller relationship with Christ and his Church. As known and lived in the Episcopal Church.

1. **Information on parish life is available.** This may be a packet or a handbook with information on parish guilds and organizations, educational & spiritual formation opportunities, sacramental standards, and so on. The information is also on the web site.

Not at all 1 2 3 4 Very much so 5

2. There is an **orientation to participation in the Eucharist** available on a regular basis (might be an occasional session of 40 minutes just after the Eucharist and/or booklets that describe the ways in which members of the congregation can participate) [Note: This is not an “instructed Eucharist” that cuts across the community’s usual worship and is theoretical in tone. It is about how people in the congregation can participate – in the spoken parts, in silence, in the use of the body]

Not at all 1 2 3 4 Very much so 5

3. **A gathering** that is partly social and partly educational; done as needed, at least once every 3 – 4 months. It may be a social event at the rectory – with priest and 2 – 3 parish leaders who are good at such events. Or it could be a newcomers class in the parish hall.

Not at all 1 2 3 4 Very much so 5

4. Other:

Not at all				Very much so
1	2	3	4	5

5. Other:

Not at all				Very much so
1	2	3	4	5

Integrating

This is about integrating a person into a healthy and faithful community. It assumes there is ongoing attention to the formation of the parish community and that people may be integrated into that process. The parish needs an ability to help people enter more deeply into the Christian life; to assist them in forming a spiritual discipline (rule of life;) and in developing increasingly mature habits for Christian living. A very useful resource in doing this is a foundation course for adults. A foundations course is a substantial educational and training program that is repeated over the years and is used to incorporate people into the parish and the spirituality of the Episcopal Church.

1. New people and long-term members have regular opportunities to **develop a spiritual discipline** and a rationale for it.

Not at all				Very much so
1	2	3	4	5

2. New people and long-term members have regular opportunities to build **relationships and friendships** with others.

Not at all				Very much so
1	2	3	4	5

3. New people and long-term members have regular opportunities to **learn the tradition, especially the daily and weekly rituals** -- Holy Eucharist, praying the daily prayers of the church with the church (Office), and forms of personal devotions that fit the person's personality and provide ways of reflecting that allowing us to see our experience in relationship to who we are as baptized members of the Body

Not at all				Very much so
1	2	3	4	5

4. New people and long-term members develop an awareness that we are **representatives of Christ and his Church wherever we may be**; seeing that most people's ministry is in their family, with friends, and work and as citizens.

Not at all				Very much so
1	2	3	4	5

5. New people and long-term members are helped to **establish a responsible form of participation in parish life**. For some that will be focused on the basics of Sunday Eucharist, pledging and attending a few parish meetings; for others it will involve accepting a leadership role.

Not at all				Very much so
1	2	3	4	5

6. Other:

Not at all				Very much so
1	2	3	4	5

7. Other:

Not at all				Very much so
1	2	3	4	5

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Rating Team Effectiveness

1. Direction & Goals

Poor 1 2 3 4 5 6 7 8 9 10 Good

Confused; conflicting; unrealistic; uninteresting to or no "ownership by" members.

Clear and shared by all; important to all; "owned."

Comments:

2. Participation in Team Meetings

Poor 1 2 3 4 5 6 7 8 9 10 Good

A few dominate; some listen; several talk at once or interrupt.

All participate; all are listened to

Comments:

3. Expression of Feelings

Poor 1 2 3 4 5 6 7 8 9 10 Good

Feelings are unexpressed, ignored or criticized.

Freely expressed, empathetic responses

Comments:

4. Planning to Accomplish the Team's Work

Poor 1 2 3 4 5 6 7 8 9 10 Good

Done by one or two

Shared by all members.

Comments:

5. Decisions

Poor 1 2 3 4 5 6 7 8 9 10 Good

Needed decisions don't get made; decisions made by one person or clique; others uncommitted.

Agreement sought and tested; differences used to improve decisions; decisions made are fully supported.

Comments:

6. Shared Leadership for Team Work

Poor 1 2 3 4 5 6 7 8 9 10 Good

Team depends on one person or a clique: little shared sense of responsibility for team success.

Team needs are met by various members, strong sense of shared responsibility.

Comments:

Assessing Your Spiritual Practices

From: *In Your Holy Spirit: Traditional Spiritual Practices in Today's Christian Life*, Michelle Heyne, Ascension Press, 2008

SUNDAY EUCHARIST

1. Attendance (circle one)

Almost Never	About ¼ of the Time	Half the Time	¾ of the Time	Almost every Sunday
--------------	---------------------	---------------	---------------	---------------------

2. My ability to participate (Circle the number that is closest to your experience)

I am frequently confused and uncertain about how to participate				I can “flow” with it. I mostly don’t need a Prayer Book or leaflet.
1	2	3	4	5

PARTICIPATING IN THE DAILY PRAYERS OF THE CHURCH

3. Saying the Office. I say the Office in some form on my own or with others.

Never	Only when offered at a meeting or retreat	Sporadically or during some season(s) of the church year	Most days
-------	---	--	-----------

4. Knowing how to do the Daily Office.

I have no idea.				I understand how to use it in the Prayer Book and ways to innovate the use
1	2	3	4	5

DISCIPLINED WAYS OF REFLECTING [“Listen to your life”]

Grounding/centering yourself so you can reflect. The spiritual practice of “pondering” and seeking God’s presence in the people, circumstances and things of life. Practices that connect daily life to God.

5. Ways that work for me

I don’t have ways that work for me				I have ways that are effective for me
1	2	3	4	5

PARTICIPATING IN THE PARISH COMMUNITY

6. The community I seek is one in which people are free to be themselves; to speak and listen fully and

authentically. In which differences are accepted (we can fight with those we love). In which we can make decisions and solve the problems we face.

I don't want church to be that way				It is what I seek and more
1	2	3	4	5

7. Connection with people

I don't know anyone well				I know a number of people and have a few friends in the parish
1	2	3	4	5

8. Participation in parish social life

Not at all				I participate regularly and frequently
1	2	3	4	5

SERVICE

9. In Daily Life—with family & friends, at work, in civic life, and at church.

I don't have a clear understanding of how I serve in my daily life				I am very clear about serving in daily life
1	2	3	4	5

THE PROCESS OF SPIRITUAL GROWTH

10. Foundations

I have a poor foundation in the spiritual practices of the church				I have a strong foundation in the spiritual practices of the church
1	2	3	4	5

11. Experiment

I don't know how or feel confident enough to experiment with spiritual practices				I have a sense of how to innovate and experiment with spiritual practices.
1	2	3	4	5

Worksheet: Christian Life Model

Available at Shaping the Parish Resources www.orderoftheascension.org as “Christian Life Model - Your spiritual life.”

Make notes on your current practice in each area. Note any intention about experimenting or changing at the end of each section.

A. WORSHIP: *Continue ... in the breaking of the bread and the prayers.*

1. Holy Eucharist – Participation on all Sundays and Major Holy Days
2. Daily Office - which Office? When? How? With whom?
3. Personal Devotions – Intercession and/or recollection and/or meditation and/or ...
4. Spiritual Reading
5. Other

In what ways do I want to experiment with or change these practices?

B. DOCTRINE: *Continue in the apostle’s teaching and fellowship*

Connecting yourself with what has authority in the Christian Life. Increasing your ability to relate those sources of authority to your decision-making; understanding how to use Scripture – Tradition – Reason as you reflect on your life and as a backdrop in discernment and decision making.

1. Scripture – doing lectio divina and/or study. Consider relating this to use of the Daily Office
2. Christian doctrine, church history, ethics
3. Other

In what ways do I want to experiment with or change these practices?

C. ACTION: *To represent Christ and his church; to bear witness to him wherever they may be*

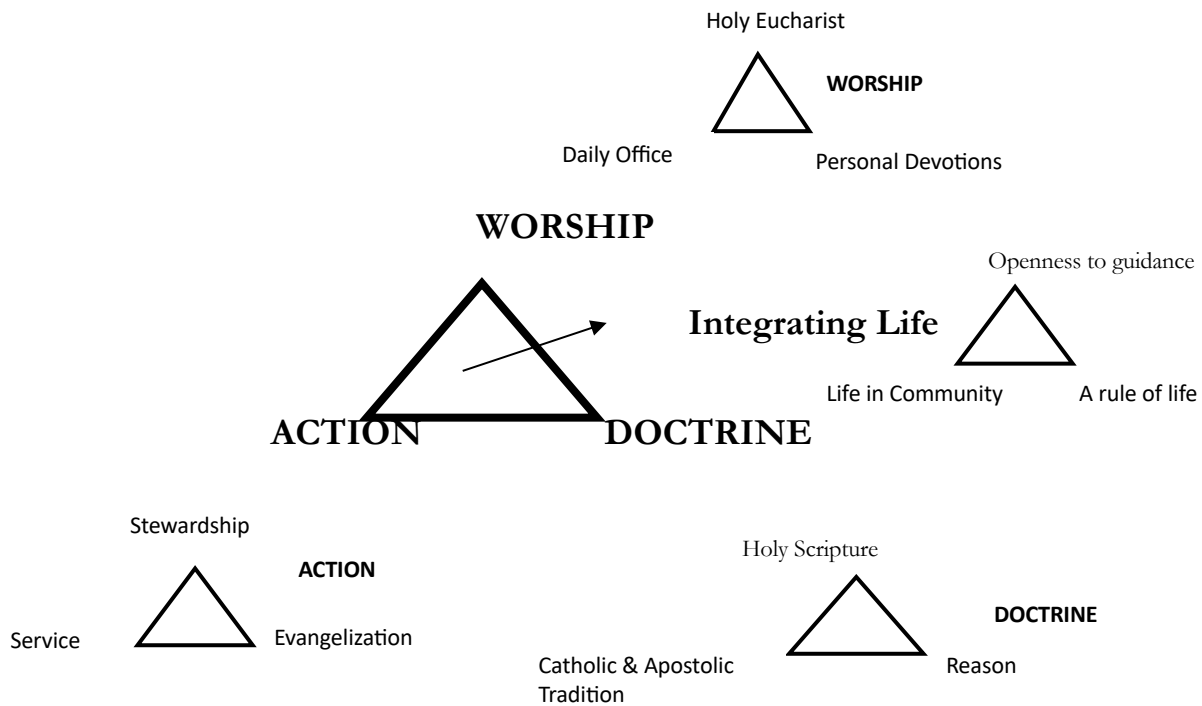
Describe your responsibilities and opportunities for service, evangelization and stewardship in the various areas of your life.

1. Family

2. Friends
3. Work
4. Community – Neighborhood – as a citizen
5. Church
6. Self

In what ways do I want to experiment with or change these practices?

THE CHRISTIAN LIFE MODEL



NOTE: When used as an organizational model for the parish church The “Integrating Life” triangle becomes “oversight” and it’s three elements are spirituality, leadership, and community.

Christian Life Model - Copyright Robert A. Gallagher 1984, 2006. Also see chapter 2 in *Fill All Things: The Dynamics of Spirituality in the Parish Church*, R. Gallagher, Ascension Press, 2008

ASSESSMENT OF PARISH LIFE AND MINISTRY

The Christian Life Model

NOTE: In this example we are only looking at the collation of ratings. Other elements of the form have been removed.

Results in a vestry

1. Overall satisfaction with Parish Life and Ministry

I am very dissatisfied	1	2	3	4	5	6 /////	I am very satisfied
						/////	

2. *Worship* - How well we worship as a community. Equipping people for participation in the Eucharist and the use of the Daily Office and personal devotions. Climate: issues of style, beauty, flow; appropriate use of the Holy Eucharist and Daily Office; teaching and coaching the congregation for prayer life and participation in liturgy; functioning of guilds and individuals that play special roles; schedule; participation, etc.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4	5	6 /////	I am very satisfied
						/////	

3. *Doctrine* - The parish's awareness of what has authority in the Christian Life. Competence as a congregation and individuals in relating those sources of authority to decision-making.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4	5	6 /////	I am very satisfied
						/////	

4. *Action* - Corporate action of service, evangelization, stewardship; lay members' awareness of their apostolate in the workplace, family, civic life, church. Parish's dealing with the tension between the parish's corporate ministries and the individual's apostolate in daily life.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4	5	6 /////	I am very satisfied
						/////	

5. *Oversight* - Competence and commitment of leaders, clergy and lay, for leadership and management; building community; and deepening the congregation's spiritual life; leaders serving, guiding, leading and managing the parish into an appropriate and full living of the Christian Life: bringing and preserving a proper order/shape in the parish's life; methods for reflecting, discerning and planning in parish life; lay-clergy relationships; sense of direction, etc.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4	5	6 /////	I am very satisfied
						/////	

ASSESSMENT OF PARISH LIFE AND MINISTRY

The Christian Life Model

NOTE: In this example we are only looking at the collation of ratings. Other elements of the form have been removed.

Results from a parish meeting of vestry and other leaders

1. Overall satisfaction with Parish Life and Ministry

I am very dissatisfied	1	2 //	3	4 //	5 /////	6 /////	I am very satisfied
-------------------------------	---	---------	---	---------	------------	------------	----------------------------

2. *Worship* - How well we worship as a community. Equipping people for participation in the Eucharist and the use of the Daily Office and personal devotions. Climate: issues of style, beauty, flow; appropriate use of the Holy Eucharist and Daily Office; teaching and coaching the congregation for prayer life and participation in liturgy; functioning of guilds and individuals that play special roles; schedule; participation, etc.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4 /	5 /////	6 /////	I am very satisfied
-------------------------------	---	---	---	--------	------------	------------	----------------------------

3. *Doctrine* - The parish's awareness of what has authority in the Christian Life. Competence as a congregation and individuals in relating those sources of authority to decision-making.

a. *Overall satisfaction*

I am very dissatisfied	1	2 /	3 /////	4 /////	5 //	6	I am very satisfied
-------------------------------	---	--------	------------	------------	---------	---	----------------------------

4. *Action* - Corporate action of service, evangelization, stewardship; lay members' awareness of their apostolate in the workplace, family, civic life, church. Parish's dealing with the tension between the parish's corporate ministries and the individual's apostolate in daily life.

a. *Overall satisfaction*

I am very dissatisfied	1	2 ///	3 ///	4 ////	5 ////	6 ///	I am very satisfied
-------------------------------	---	----------	----------	-----------	-----------	----------	----------------------------

5. *Oversight* - Competence and commitment of leaders, clergy and lay, for leadership and management; building community; and deepening the congregation's spiritual life; leaders serving, guiding, leading and managing the parish into an appropriate and full living of the Christian Life: bringing and preserving a proper order/shape in the parish's life; methods for reflecting, discerning and planning in parish life; lay-clergy relationships; sense of direction, etc.

a. *Overall satisfaction*

I am very dissatisfied	1	2	3	4 /////	5 /////	6 /////	I am very satisfied
-------------------------------	---	---	---	------------	------------	------------	----------------------------

Some Key Factors

Can be found in Shaping the Parish Resources www.orderoftheascension.org as “Key Factors (2021)” in Assessments section.

Please assess your parish using these factors:

	Low				High
A. Overall satisfaction with parish life & ministry	1	2	3 3	4 18	5 4
B. Effectively engaging the three purposes of a parish church in a manner fitting parish size and charism. Overall rating	1	2 1	3 10	4 6	5 3
4. The worship of God – fullest Prayer Book Pattern is a Sunday Eucharist, a public Daily Office (daily), and equipping members for personal devotions (especially reflection)	1 1	2	3 5	4 9	5 8
1 a. Primary - Great Sunday Liturgy and social time	1	2 2	3 4	4 5	5 10
5. The formation of the People of God – Fullest expression is a strong adult process in the tradition of the Episcopal Church - the total impact of Liturgy, spiritual guidance, overall parish climate, programs. At least 1/4 of those present on Sunday are very competent in the spiritual practices of the Episcopal Church.	1	2 8	3 4	4 6	5 2
6. Having a sanctifying relationship with the broader community.	1 1	2 6	3 8	4 3	5 1
C. Vibrant - The extent to which parish life is vibrant, creates a "buzz" that excites the congregation and spills over to the wider community, an attractive energy.	1 1	2 5	3 7	4 7	5 1
D. Alignment - The elements of parish life are mostly in alignment: income-expenses, the energy, and funds to carry out the vision we have; liturgical space or number of services to match the number of attendees, and so on.	1	2 2	3 10	4 3	5 2

Your comments:

Using Assessments – Questionnaires

- The routine use of assessments can contribute to a listening climate in the parish.
- Having the results of the assessment fed back in the same session increases the likelihood of effective follow through and strengths the listening climate.
- Assessments can help build and reinforce a common language in the parish. That can increase people’s sense of competence and investment.
- You can find a number of assessments in the Shaping the Parish Resources at www.orderoftheascension.org

Setting	When	Comments
Annual Meeting	A broad, model based, assessment. Includes an “overall satisfaction” rating	For example, Some Key Factors, Christian Life Model. A form short enough to allow the collation of the results quickly during the meeting.
Other parish community meetings	Opportunity to pursue an issue with some of the more active parishioners, e.g., incorporation process, hospitality, a corporate ministry of the parish, spiritual practices.	See “Community Meetings” in <i>Fill All Things</i> , chapter on Benedictine Promise, section “Define and Shape a Parish Culture with Benedictine Characteristics.” It’s important that these meetings be listening rather than selling sessions.
Vestry	Use the Vestry Self-Assessment each year. It is a standard team building tool – “what do you bring to the table?”	The vestry’s effectiveness and sense of self management can be improved by occasionally using a team assessment. There are several available in the Shaping the Parish Resources.
Around specific and limited issues	A “testing process” can be done for a few minutes at coffee hour, at vestry meetings, in working teams and at parish community meetings. Use a Testing Process at least a few times each year.	See “Testing Process” in Shaping the Parish Resources. The routine use of a Testing Process can help prevent emerging disagreements from becoming serious conflict. The process can be used too little or too much, so consider the impact on the group.