

CONGREGATIONAL DEVELOPMENT LEADERSHIP/CONSULTANT ASSESSMENT

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This assessment is for: _____

Address _____

Phone _____

E-Mail _____

A. This assessment is on the person's skills and knowledge as a (circle one):

1. Congregational development leader
2. Congregational development consultant

B. This assessment is a (circle one):

1. Self assessment
2. Peer assessment (by someone trained in congregational development)
3. Congregational leader assessment (a member and leader of the congregation)
4. Client assessment (for a consultant)

C. Evaluator's Name

Address _____

Phone _____

D. Please describe the specific settings in which you have observed the person's performance as a leader or consultant (e.g., "I was a lay leader in a congregation where Mary was the pastor. She lead us in a long term process of moving from decline into a stronger spirituality and membership growth.")

E. Rating - Please apply this rating scale to the items that follow. Indicate with an "X" response, those areas where you do not have adequate information to give a rating.

Very Low Competence	1	2	3	4	5	6	Very High Competence
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CONGREGATIONAL AND ORGANIZATION DEVELOPMENT

1. Can clearly articulate what congregational development and organization development is; what the objectives and assumptions are. _____
2. Understands and can facilitate the process of planned change in a manner appropriate to role. _____
3. Can facilitate the congregation in establishing a clear direction and vision, which is grounded in the

Church's mission and identity; that attends long-term, systemic development; that fits the particular congregation; and that places immediate needs and crises within a broader approach to the parish's development. _____

4. Can help the congregation navigate toward the congregation's vision, with self-directed and flexible leadership. _____

5. Can enable the congregation to manage the dynamics of the transformation process, including dealing with conflict and resistance; managing the polarity of change and stability; putting in place the structures, processes and climate needed for development; developing leaders in the congregation. _____

THEOLOGY AND SPIRITUALITY

6. Can help congregational leaders relate the ministry of congregational development to Anglican identity and spirituality. _____

7. Can help the congregation explore the role of the Eucharist in shaping the community. _____

8. Can articulate the relationship between their leadership or consultant role and their own spiritual life. _____

9. Can help priests and congregations explore and act on the relationship between the priest's presiding in the community's life and presiding in the Eucharist. _____

OVERALL LEADER/CONSULTANT STYLE

10. Has a clear intention and actions directed at increasing the organization's competence for self-management, ability to solve problems and address opportunities, capacity to adapt to new conditions and learn from experience _____

11. Effectively manages dependency issues. _____

ETHICS

12. Recognizes the boundaries of his/her competence and operates within those boundaries (i.e., doesn't offer services for which he/she is not adequately trained) _____

13. Serves in a manner that is respectful, timely, and thorough. _____

14. Does not misrepresent qualifications, training or intentions. _____

15. Makes the limits of confidentiality clear. _____

SYSTEM AND ORGANIZATIONAL THEORY AND INTERVENTION

16. Has several frameworks for helping the congregation assess itself as a Christian community with unique dynamics and goals (e.g., The Shape of the Parish, Renewal-Apostolate Cycle, The Christian Life Model, the Benedictine Promise, Nature and Mission, Analogies and Images, etc.) _____

17. Understands and can help a congregation assess itself in relationships to frameworks in the following areas: _____

a. Organizational life cycles as applied to the congregation _____

b. Organizational subsystems _____

c. Size _____

d. Dynamics of change and stability _____

e. In relationship to the external forces and trends of the larger society and Church _____

f. Organizational Culture _____

18. Assessing the effect of her/his activities on the congregation _____

19. Helping the organization to accurately identify their opportunities and problems and to develop effective strategies for development. _____

INTERVENTION THEORY AND PRACTICE

20. Displays an understanding of intervention theory. _____
21. Has the ability to facilitate a congregation in a variety of interventions, including:
- a. Diagnostic activities (data gathering and diagnosis) _____
 - b. Planning and envisioning activities _____
 - c. Team building _____
 - d. Education and training (activities to improve the competence of individuals or teams) _____
 - e. Strategy formation and problem solving activities (e.g. force field analysis, SWOT, etc.) _____
 - f. Technostructural activities (to improve the effectiveness of technical or structural forces affecting people). _____
22. Shows an understanding of the relationship of intervention theory and methods to role (e.g., manager/pastor, external consultant, internal consultant, internal change agent) _____
23. Makes sound judgements about when to focus on changing/strengthening the organizational culture and when to focus on increasing individual competence; also how to relate both. _____
24. Demonstrates a working knowledge of a variety of theories of congregational/organization development, leadership and management, etc. _____
25. Introduces theory in an appropriate manner (fits the congregation's concerns/needs/issues) _____

GROUP DEVELOPMENT AND TEAM FACILITATION SKILLS

26. Shows an understanding of group development theory. _____
27. Competence as a small team facilitator (up front skills, energy, etc.). _____
28. Competence as a facilitator of large groups. _____
29. Uses a variety of methods to help teams work on their tasks. _____
30. Helps teams to develop clear priorities. _____
31. Helps teams deal effectively with conflict. _____
32. Creates a trusting climate in a team. _____
33. Uses methods to develop self-managing teams. _____
34. Helps a team to effectively deal with its task and manage its relationships. _____
35. Makes judgments about when to emphasize team building and when to emphasize mobilizing and equipping individual strengths and interests. _____
36. Makes judgments about emphasizing interdependence and collaboration and when to emphasize individual autonomy and competence. _____

INTERPERSONAL AWARENESS AND SKILL

37. Understands his/her own facilitation style and its effect on people. _____
38. Maintains clear and appropriate boundaries and connections with the people with whom she/he is working. _____
39. Shows positive concern and respect for those with whom she/he is working. _____

40. Uses effective communication skills (e.g. listening, paraphrasing, active listening, itemized response, etc.) _____

SELF AWARENESS

41. Is aware of his/her own feelings, needs, biases, thought patterns, and expresses them appropriately. _____
42. Is aware of her/his own strengths and weaknesses; uses and manages them appropriately. _____
43. Is aware of his/her defensive patterns and manages them appropriately. _____
44. Demonstrates congruence of words, intentions and behavior. _____
45. Places appropriate emphases on hearing other people’s feedback vs. her/his own internal feedback. _____

PRESENTATION SKILLS

46. Makes appropriate use of voice (e.g. volume, tone, pitch, pacing, etc.) _____
47. Makes effective use of gestures to add interest and emphasis. _____
48. Adopts appropriate posture/stance for the setting (e.g., relaxed/rigid, open/closed, drawing in/distancing, etc.) _____
49. Has a sense of “contact” with the group. _____
50. Has a grasp of the material being presented. _____
51. Fit with the training goals. _____
52. Seems prepared, organized. _____

SPECIALIZED AREAS OF COMPETENCE

53. Clarity regarding what special areas of competence he/she brings to the ministry of congregational development. _____
54. Competence level in the following areas:
- a. Highly conflicted situations _____
 - b. Evangelization and growth _____
 - c. Financial stewardship _____
 - d. Search process _____
 - e. Diocesan systems for congregational development _____
 - f. Long term and complex congregational development _____
 - g. Congregational development in declining congregations _____
 - h. Starting new congregations _____
 - I. Working with clusters or area ministries _____
 - j. Congregations dealing with major trauma, grief or scandal _____
 - k. Education and formation methods and programs and their relationship to the congregation’s development _____
 - l. Congregational self-definition and marketing _____
 - m. Communal discernment methods _____

LEADERSHIP OF CONGREGATIONAL DEVELOPMENT

This section applies to those serving in some leadership role in the congregation or on the diocesan staff in relationship to the development of congregations.

- 55. Has a leadership style that is flexible enough to fit the congregation's culture and place in its organizational life cycle. _____
- 56. Demonstrates ability to clearly set and navigate in a direction. _____
- 57. Demonstrates ability to "stay in touch" with the congregation's other leaders and active members (to hear, respect and appropriately respond to their ideas, feelings, values and concerns). _____
- 58. Has a leadership style that empowers others; increases the capacity of individuals and teams for self-management. _____
- 59. Attends to his/her own spiritual life. _____
- 60. Is effective at strategic management (i.e., helping the congregation to give adequate attention to developmental issues, new opportunities, relationship building, spiritual deepening, crisis prevention, etc.) _____
- 61. Is effective at leading in the implementation of plans. _____

CONSULTATION SKILLS

- 62. Develops a clear agreement with clients (based on the client's expectations and hopes and the consultant's willingness and ability to respond). _____
- 63. Makes clear and appropriate financial arrangements. _____
- 64. Maintains an effective working relationship with the congregation's leaders. _____
- 65. Helps the client accept responsibility for the developmental work (not accepting responsibility for the client's problems, goals, etc. Not over-functioning or creating unhealthy dependency) _____
- 66. Makes effective use of the client's strengths and opportunities. _____
- 67. Has ability to acknowledge his/her own limits; to say "I don't know," "I'm confused." _____
- 68. Makes effective use of his/her own strengths in the consultation process. _____
- 69. Comes across as "authentic" (there is an integration of the person in the consultant role) _____
- 70. Helps clarify the issues in the congregation in initial meetings. _____
- 71. Helps the congregation to identify its primary strategic issues (i.e., long-term, systemic, capacity building, etc.) _____
- 72. Helps the congregation decide on specific action steps to solve problems and act on strategic goals. _____
- 73. Helps the congregation establish effective methods to monitor and take initiative in the developmental task. _____
- 74. Helps the congregation plan for effective follow-up. _____
- 75. Leaves the congregation with more competence, better able to solve its problems and use its own resources. _____
- 76. Changes the working relationship in a collaborative manner. _____

77. Disengages from the relationship in a mutually agreed-upon reduction of involvement. _____

AS A LEADER/CONSULTANT (circle one)

He/she met the congregation's expectations in congregational development.

Failed to Meet Expectations		Adequately Met Expectations		Far Exceeded Expectations	
1	2	3	4	5	6

Major strengths were:

Areas that need continued professional development are:

Self -Assessment – person being assessed summarizes

In each competency area summarize your strengths and areas that need professional development.

Strengths

Need Development

Congregational and
Organization Development

Theology and Spirituality

Leader/Consultant Style

Strengths

Need Development

Ethics

System & Organizational
Theory and Intervention

Intervention Theory and
Practice

Group Development &
Team Facilitation Skills

Interpersonal Awareness
and Skill

Self Awareness

Presentation Skills

Specialized Areas of
Competence

Leadership of
Congregational
Development

Consultation Skills

