



DISCUSSION GUIDE

Study

Building a Culture of Evaluation: Eight Insightful Studies

The Value of Evaluation

Assess: What value does your church or organization place on regular evaluation?

Insights and Ideas

he idea of evaluation can stir a variety of emotions. Evaluation invigorates some people because it precedes the opportunity for change. Others find it frightening, thinking, *I must be doing something wrong*. Still others see it as nothing more than a spirit of criticism masked as a strategy for improvement.

While evaluation can feel emotional, it's actually biblical. The apostle Paul said to "examine yourselves" (2 Corinthians 13:5). Lamentations 3:40 says, "Let us examine our ways and test them, and let us return to the Lord." Even the Bereans "examined the Scriptures every day to see if what Paul said was true" (Acts 17:11). If we're honest, we know there is enormous value in evaluation. As a starting point, consider these four benefits:

- Evaluation makes <u>improvement</u> possible. Without evaluation we would quickly move into mediocrity or, worse, irrelevance. Evaluation helps you maintain a continual posture of improvement. It forces you to mine for best practices, welcome outside feedback and perspective, and maximize your impact.
- 2. Evaluation builds <u>credibility</u> with others. When we fail to evaluate our lives, our ministries, and our strategies, leaders and teams around us begin to question our credibility. They start to wonder, *Does he even know how bad things are? Does she even see what's happening around her?* Evaluation helps your team members know you're in touch with what's going on. As brutal as they can be, facts are ultimately your friends.
- 3. Evaluation enhances the <u>stewardship</u> of time, energy and money. When we stop evaluating, we are ultimately excusing our willingness to steward wisely the time, energy and money God entrusts to us. Evaluation helps us identify waste of resources, develop more effective practices, and become increasingly efficient as a ministry. Plus, God has a record of blessing good stewardship.
- 4. Evaluation strengthens <u>culture</u>. Choosing to evaluate programs, strategies, staff and volunteers helps you build a stronger, healthier culture. It keeps the church flexible, strategic and focused, while continually cultivating a spirit of excellence. Without evaluation, culture tends to drift toward complexity (we just keep adding more programs), mediocrity (we become content with average), and inflexibility (we become resistant to change).

Each of these values of evaluation have the power to open the door to more fruitfulness in your life, ministry, and church or organization. But it begins with a willingness on your part to embrace honest evaluation.

Reflect and Discuss

- 1. What typically comes to your mind when you think about evaluation?
- 2. What do we regularly evaluate as a church or organization?
- 3. Which of the four values of evaluation most challenge you?

Apply

To benefit from evaluation, you must willingly embrace its value. Take some time to pray through any resistance you have to evaluation. What is making you resistant? How has evaluation hurt you in the past? What change do you need to make in your attitude toward evaluation so you can grow and benefit from all it has to offer?



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"Examine yourselves ..." (2 Corinthians 13:5).

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Four benefits of evaluation:

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Building a Culture of Evaluation: Eight Insightful Studies

The Keys to Effective Evaluation

Team Review: What did the Lord reveal to you as you prayed through your attitude toward evaluation?

Assess: What keys are essential for making evaluation an effective part of an organization?

Insights and Ideas

B uilding a culture of evaluation requires certain elements that promote a healthy environment. Without these, evaluation can become out of balance, and even produce dysfunction within a church or organization. With these elements, evaluation becomes a catalyst to improve your personal and organizational health.

Three things are essential for effective evaluation:

- 1. The right system. Effective evaluation usually requires a system, strategy or process to provide the highest value. That system might include surveys, an evaluation form or a series of questions. For example, if you are evaluating a ministry program, do you want to distribute a survey to your members, ask the leaders a series of evaluation questions, or provide an opportunity for anonymous feedback? Without a clearly developed system, evaluation can feel haphazard, incomplete or even confusing.
- 2. The right spirit. The motive and delivery of evaluation are critical. The wrong spirit will break trust and foster suspicion. But the right spirit will draw out the best insights and provide the greatest perspective. What is the right spirit? You need a balance of candor and care. In other words, your evaluation process needs to welcome honest, candid feedback that is delivered in a caring and respectful way. There's no magic formula for the perfect balance of candor and care. Leaders must simply model candor in a trust-filled, compassionate and caring way. Proverbs 15:4 says, "Gentle words are a tree of life; a deceitful tongue crushes the spirit" (NLT). Truthfulness combined with gentleness should accompany evaluation.
- 3. *The right speed.* Effective evaluation requires an appropriate pace. When it happens too frequently, evaluation can feel like constant criticism. When it happens irregularly, small cracks can turn into major problems. Managing evaluation at the right speed allows for a healthy tension to develop between celebrating progress and evaluating how to improve. The right speed engrains evaluation into the schedule and rhythm of the organization.

The right system, spirit and speed build evaluation into the culture of a church or organization. The right system makes evaluation purposeful. The right spirit makes evaluation people-friendly. And the right speed makes evaluation predictable. Together, these elements lead to evaluation that makes the team and organization stronger.

Reflect and Discuss

- 1. What kind of evaluation system is currently in place in our church or organization? How can we make this system more purposeful and strategic?
- 2. What kind of spirit do we tend to have in our evaluation efforts? What can we do to reflect a better spirit?
- 3. What's the right speed to evaluate the following areas: staff, volunteers, services, ministries and events?

Apply

Work together as a team to determine the best way to implement the right system, spirit and speed in your evaluation processes. Do different staff or team members need to lead the evaluation process for different areas? Determine the right next steps to move your evaluation efforts forward in a healthy and effective way.



Building a Culture of Evaluation: Eight Insightful Studies

The Keys to Effective Evaluation

Assess: What keys are essential for making evaluation an effective part of an organization?

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Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Yourself

Team Review: What steps have you taken to implement the right system, spirit and speed in your organization's evaluation?

Assess: How do you regularly evaluate your personal health in the most important areas of your life?

Insights and Ideas

elf-evaluation is an important part of personal growth. In Psalm 139, David welcomed God's evaluation when he wrote, "Search me, God, and know my heart; test me and know my anxious thoughts. See if there is any offensive way in me, and lead me in the way everlasting" (verses 23–24). And Jesus said, "Why do you look at the speck of sawdust in your brother's eye and pay no attention to the plank in your own eye? How can you say to your brother, 'Let me take the speck out of your eye,' when all the time there is a plank in your own eye? You hypocrite, first take the plank out of your own eye, and then you will see clearly to remove the speck from your brother's eye" (Matthew 7:3–5).

Before we evaluate others, we must first look in the mirror. Three practices cultivate healthy self-evaluation:

- 1. Create and monitor a personal health <u>dashboard</u>. Author and pastor Wayne Cordeiro suggests a monthly practice of reviewing a personal dashboard. He recommends giving yourself a grade (A, B, C, D, F) in a variety of areas, such as spiritual life, marriage, family, work and physical health. Creating a dashboard, and reviewing it monthly, can help you make midcourse corrections before you become unhealthy.
- 2. Welcome outside <u>feedback</u>. All of us have blind spots, but the only way to discover your blind spots is to ask others to help you see them. When you welcome outside feedback from trusted family, friends, coaches and leaders, you gain insight into a variety of areas. Feedback reveals unhealthy habits, cracks in your integrity, a lack of spiritual vibrancy, how you come across to others, unsustainability in your schedule, and a host of other valuable insights. In short, outside feedback helps you address gaps before they undermine your life and leadership.
- 3. Create a growth plan with <u>accountability</u> and <u>checkups</u>. A growth plan will help you improve in the areas of weakness your dashboard and outside feedback reveal. However, for a growth plan to work, you not only need a solid plan, but you also need accountability and checkups. In other words, you need someone to hold you accountable to grow, and you need regular checkups to monitor your progress.

Reflect and Discuss

- 1. What might a personal health dashboard look like for you?
- 2. Do you have a personal growth plan? How do you ensure accountability and regular checkups are part of your plan?
- 3. How do you (or will you) regularly welcome feedback from outside sources? How have you found this feedback helpful?

Apply

Take three steps to elevate your personal self-evaluation. First, create your own dashboard to monitor health on a monthly basis. Second, schedule time with a trusted advisor who can help you identify blind spots. Finally, based on the review of your dashboard and outside feedback, choose the areas in which you want to grow. Then, create a growth plan with appropriate accountability and checkups to help you improve.



Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Yourself

Assess: How do you regularly evaluate your personal health in the most important areas of your life?

"Search me, God, and know my heart; test me and know my anxious thoughts. See if there is any offensive way in me, and lead me in the way everlasting" (Psalm 139:23–24).

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Study

Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Church Health

Team Review: What have you done to evaluate your personal health in the last seven days?

Assess: How do you regularly evaluate the overall health of the church or a ministry?

Insights and Ideas

o evaluate the health of the church, you must be deliberate in your efforts. Purposeful evaluation never happens accidently. Three things are essential for evaluating the church's health:

- 1. Courageous <u>leadership</u>. Scripture is full of examples of courageous leadership. Joshua courageously led the Israelites into the Promised Land. Daniel courageously prayed three times a day, despite the threat of death. Esther courageously spoke on behalf of the Jewish people. Nehemiah courageously returned to Jerusalem to rebuild the wall around the city. We need that same kind of courage to face the facts of a church's health. Sometimes those facts are encouraging and worthy of celebration. Other times, evaluation reveals decline, ineffectiveness or a need for painful change. Whatever the case, evaluation begins with a leader who is courageous enough to face the facts.
- 2. Clear metrics. To conduct a thorough evaluation of the church's health, you need to identify key metrics and collect appropriate data in each area. The most common are attendance and finances. However, these metrics are not enough. You should also track salvations, baptisms, volunteers, leaders, participation in small groups, first-and second-time donors, per capita giving, and other important areas. Also measure the percentage of your weekend attendance engaging in these areas, and monitor the annual growth or decline of those percentages. Finally, measure stories of life change, community transformation and missions impact. Are you reaching the lost? Are you developing disciples? Are you mobilizing people for ministry? Clear metrics help you see the overall picture. If you don't know where you are, you'll have difficulty navigating to a better destination.
- 3. Comprehensive <u>analysis</u>. There are two helpful analysis strategies. The first is a S.W.O.T. analysis. Gather a group of staff and leaders to evaluate the church's <u>strengths</u> (what the church does well), <u>weaknesses</u> (areas where the church is struggling), <u>opportunities</u> (new ideas or opportunities the church can leverage), and <u>threats</u> (things that could be detrimental to the church's health or growth).

A second approach is to evaluate the church, a ministry, an event, or a service with four questions: What's right? What's wrong? What's missing? What's confusing?

Both strategies will help you analyze current health and potential areas of improvement.

Reflect and Discuss

- 1. On a scale from 1 to 10, how would you assess your courage as a leader when it comes to facing the facts?
- 2. What metrics do you evaluate regularly? On what new metrics do you need to collect data?
- 3. Do you need to conduct a S.W.O.T. analysis of the church as a whole? With which ministries do you need to ask the four questions?

Apply

Conduct a S.W.O.T. analysis of the church, and/or ask the four questions regarding a specific ministry in the church. From the results of each analysis, put together an action plan to make improvements.



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Evaluating Church Health

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Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Strategies

Team Review: What did your S.W.O.T. analysis reveal about your organization, church or a ministry within your church?

Assess: What does it look like to evaluate the strategies in your church or organization?

Insights and Ideas

n the Gospel of Luke, Jesus challenged the crowds to count the cost of being His disciples. He compared it to building a tower when He said, "Suppose one of you wants to build a tower. Won't you first sit down and estimate the cost to see if you have enough money to complete it? For if you lay the foundation and are not able to finish it, everyone who sees it will ridicule you, saying, "This person began to build and wasn't able to finish'" (Luke 14:28–30).

Organizational strategies require a similar discipline of counting the cost to ensure we're adopting strategies that provide the best path forward. However, developing a strategy and evaluating a strategy are two different things. After all, every strategy has a shelf life. To evaluate a strategy's effectiveness, ask four probing questions:

- 1. *Is the strategy fulfilling the <u>purpose for which it was created?</u> Every strategy is designed to meet a need or solve a problem. When evaluating a strategy's effectiveness, leaders must honestly answer whether the strategy is still fulfilling its original purpose.*
- 2. Is the strategy relevant to its target <u>audience</u>? Most strategies focus on a specific group of people. It might be a ministry strategy for children, youth, singles, couples or seniors. Leaders have to remember that these groups usually change over time. What worked with children just a few years ago may not work today. If you're out of touch with your target audience, your strategy may also be irrelevant.
- 3. Is the strategy <u>sustainable</u> in its current design? A strategy may be fulfilling its purpose and be relevant to its target audience, but if it is burning through volunteers and consuming a lot of time, energy and money, it may not be sustainable in its current design. Leaders must determine whether a strategy will work long-term based on the effort required to keep it running.
- 4. *Is the strategy able to <u>scale</u> with the growth of the church*? It's possible for churches to outgrow strategies. Consider whether your strategy has the ability to grow with the church. If church growth outpaces the scalability of the strategy, it's time for a new strategy.

Reflect and Discuss

- 1. How often do you evaluate the effectiveness of strategies in your church?
- 2. Which of the four strategy questions most challenges you? Why?
- 3. Which strategy in your church or organization feels tired or ineffective? What grade would you give the strategy if you filtered it through the four strategy questions?

Apply

Choose a strategy in the church that is in need of evaluation. Assemble a team to evaluate the strategy with the four probing questions. Based on the responses to each question, what changes does the strategy need?



Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Strategies

Assess: What does it look like to evaluate the strategies in your church or organization?

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1. Is the strategy fulfilling the ________ for which it was created? Every strategy is designed to meet a need or solve a problem.

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Apply

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Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Staff and Leaders

Team Review: Which strategy did you evaluate using the four probing questions? What discoveries did you make in the process?

ASSESS: What system do you have in place to evaluate staff or leaders?

Insights and Ideas

n the Parable of the Bags of Gold (Matthew 25:14–30), the master entrusted his wealth to three servants. To one servant he gave five talents, to another two talents, and to another one talent. When the master returned from a long trip, he evaluated each servant. The five-talent and two-talent servants doubled their master's wealth. The master called them "good and faithful" servants and rewarded each accordingly. The third servant buried his talent in the ground, which brought scorn from the master. In this parable, Jesus equates faithfulness with stewardship and growth.

Like the master, we have a responsibility to evaluate the people we lead. Why? Because God has entrusted us to faithfully steward time, talent, treasure and, most importantly, the mission of Jesus. Two things are essential for evaluating the people who report to us:

- 1. Establish <u>measurements</u>. To evaluate staff members, there must be something to evaluate them against. Simply put, you have to identify a measurement to which you can hold them accountable. That measurement could be a series of goals, a personal growth plan or a church-wide initiative. According to the Parable of the Bags of Gold, "After a long time the master of those servants returned and settled accounts with them" (verse 19). The master must have established an expectation previously since he planned to settle accounts. Have you established and communicated a clear measurement (some form of expectation) with your staff or the people you lead?
- 2. Evaluate <u>performance</u>. Once we establish the measurement (a goal, standard, growth plan, etc.), we are responsible for evaluating performance against that measurement. This evaluation requires a <u>pace</u> and a <u>process</u>. The pace has to do with the frequency of evaluation. The process has to do with the method of evaluation. For example, you might choose to evaluate progress monthly or quarterly by using a series of evaluation questions. You might use a biannual review to monitor performance and progress. We don't know how long it was before the master returned from his trip, but we do know he evaluated performance upon his arrival.

Both ingredients — establishing measurements and evaluating performance — are essential if you want to help your staff grow and reach the next level. Both will help you draw the potential out of people and deliver greater ministry impact.

Reflect and Discuss

- 1. How do you currently evaluate staff and leaders? What are the strengths and weaknesses of your process?
- 2. Do you have clear measurements for each member of your team? How can you improve these processes?
- 3. What would be a good pace and process for evaluating your staff and teams?

Apply

Work on a clear plan to establish measurements and evaluate performance with your staff and leaders. Put the process in writing, communicate it to your leaders, and then carefully implement it. You might even talk with other pastors and leaders to explore a variety of evaluation methods. Find what fits in your culture.



Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Staff and Leaders

ASSESS: What system do you have in place to evaluate staff or leaders?

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Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Culture

Team Review: What process did you settle on for evaluating staff and leaders in your church or organization?

Assess: What do you think it means to evaluate the health of your church's culture?

Insights and Ideas

ations have their own languages, customs, food preferences, music styles and governing structures that all contribute to the overall culture. These unique dynamics are not necessarily right or wrong. They just *are*. The way people do things in a given place make up the culture.

The same is true in a church or organization. There are certain methods, traditions and ways of doing things that form your culture. Sometimes we drift into an unhealthy culture because we weren't intentional about culture creation.

Galatians 6:3–5 says, "If anyone thinks they are something when they are not, they deceive themselves. Each one should test their own actions. Then they can take pride in themselves alone, without comparing themselves to someone else, for each one should carry their own load."

How often does this principle play out on an organizational level? We think we're something we are not; as a result, a culture of dysfunction develops. That's why we must test our actions to ensure we're creating a healthy environment. In general, three things create culture:

- 1. What we <u>tolerate</u> creates culture. How often do you find yourself frustrated because of a team member's behavior or a broken system? When you fail to deal quickly with these issues, you are actually creating culture. Whatever you tolerate will become ingrained in the culture.
- 2. What we <u>celebrate</u> creates culture. The things we celebrate as wins define what we consider most important. As you intentionally celebrate those victories, you are communicating to the rest of the team what you value. You're creating culture around the behaviors and priorities that truly matter.
- 3. What we <u>evaluate</u> creates culture. The things you consistently evaluate whether growth patterns, spiritual next steps, leadership deployment, or disciple making directly impact the kind of culture you're creating. People pay attention to what you evaluate because it signals how you will measure their performances. Choose what you evaluate carefully, knowing your choices create culture.

What you tolerate, celebrate and evaluate will set the tone for culture in your church or organization. The question is, have you intentionally defined all three of these?

Reflect and Discuss

- 1. What have you been tolerating in your culture for far too long? When will you address this issue?
- 2. What do people celebrate most often in your environment? How has this shaped your culture?
- 3. What are the most important things to evaluate in your church or organization? How and when can you effectively evaluate those areas?

Apply

Take some time to clearly identify what you tolerate, celebrate and evaluate. Have the courage to address the issues that are lingering and, as a result, undermining your culture. Determine how to intentionally and regularly celebrate what matters most. And identify the areas you should systematically evaluate to ensure you are creating a healthy and vibrant culture.



Building a Culture of Evaluation: Eight Insightful Studies

Evaluating Culture

Assess: What do you think it means to evaluate the health of your church's culture?

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Building a Culture of Evaluation: Eight Insightful Studies

Removing the Frustration From Evaluation

Team Review: What discoveries or adjustments did you make by identifying what you tolerate, celebrate and evaluate as a church or organization?

Assess: What are the most frustrating aspects of evaluation in your church or organization?

Insights and Ideas

culture of evaluation can bring extraordinary value to a church or organization. Evaluation can also create tremendous levels of frustration when you fail to handle it correctly. That frustration often occurs when the evaluation is haphazard, or when that evaluation produces no long-term change. When this happens, evaluations feel like a waste of time.

Here are three steps you can take to remove the frustration from evaluation:

- 1. Recognize the <u>emotional</u> side of evaluation. Everybody responds differently to evaluation. For some, it's an invigorating process. For others, it's downright scary or demoralizing. The response often reflects what kind of evaluation we've received in the past. As leaders, we must recognize the emotional side of evaluation, and then respond appropriately to the concerns and fears team members express. Your appropriate response will foster the trust necessary to build a healthy culture of evaluation in the future.
- 2. Systematize the <u>process</u> of evaluation. Systematized evaluation only happens when it becomes a part of your calendar. A weekly staff meeting that includes evaluation is more effective if it happens the same day and at the same time each week. The systematic scheduling of the meeting defines expectations for those who participate in the meeting. The same is true of annual employee reviews. When these reviews happen systematically, at the same time of year using the same evaluation process, staff members come to expect them, which removes the frustration of surprise.
- 3. Utilize the <u>information</u> you glean from evaluation. Another frustration arises when you never act on the information you receive during an evaluation discussion. For example, if you ask team members for feedback on the culture of the organization, but then you never make changes to improve the culture, people will view the act of evaluation as an unnecessary strategy and a waste of time.

James 2:14 says, "What good is it, my brothers and sisters, if someone claims to have faith but has no deeds? Can such faith save them?" In other words, faith is only relevant when we combine it with action. The same principle applies to evaluation. Action must always follow evaluation.

The goal isn't just to incorporate evaluation into your culture. The goal is for evaluation to lead to a healthier culture. The steps above will help that happen.

Reflect and Discuss

- 1. What frustrations have you experienced when it comes to evaluation?
- 2. Which of the three ways to remove frustration needs the most attention in our organization?
- 3. Are there other obstacles you foresee in building a healthy culture of evaluation? What can you do to remove those obstacles?

Apply

To reduce and remove frustration, determine how to communicate the need for evaluation while remaining sensitive to the emotional objections your team might have. Next, determine the appropriate pace for each form of evaluation you implement (weekly, monthly, annually, etc.). Finally, come up with a safeguard to ensure you'll actually do something with what you learn in the evaluation process. Remember that action must follow evaluation.



Building a Culture of Evaluation: Eight Insightful Studies

Removing the Frustration From Evaluation

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3. Utilize the you glean from evaluation. Another frustration arises when you never act on the information you receive during an evaluation discussion.
"What good is it, my brothers and sisters, if someone claims to have faith but has no deeds? Can such faith save them?" (James 2:14).
The goal isn't just to incorporate evaluation into your culture. The goal is for evaluation to lead to a healthier culture. The steps above will help that happen.
Apply

To reduce and remove frustration, determine how to communicate the need for evaluation while remaining sensitive to the emotional objections your team might have. Next, determine the appropriate pace for each form of evaluation you implement (weekly, monthly, annually, etc.). Finally, come up with a safeguard to ensure you'll actually do something with what you learn in the evaluation process. Remember that action must follow evaluation.