

CONGREGATIONAL DEVELOPMENT LEADERSHIP/CONSULTANT ASSESSMENT

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This assessment is for:

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

E-Mail 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							Very High Competence
	1	2	3	4	5	6	

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 chosen direction _____
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 _____
16. Responsibly manages financial matters _____
17. Responsibly manages issues of sexuality and intimacy _____
18. Responsibly deals with issues of power and influence _____

SYSTEM AND ORGANIZATIONAL THEORY AND INTERVENTION

19. 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.) _____
20. 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 _____

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- d. Dynamics of change and stability _____
 - e. In relationship to the external forces and trends of the larger society and Church _____
 - f. Organizational Culture _____
21. Assessing the effect of her/his activities on the congregation _____
22. Helping the organization to accurately identify their opportunities and problems and to develop effective strategies for development. _____

INTERVENTION THEORY AND PRACTICE

23. Displays an understanding of intervention theory. _____
24. 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. Techno-structural activities (to improve the effectiveness of technical or structural forces affecting people). _____
25. Shows an understanding of the relationship of intervention theory and methods to role (e.g., manager/pastor, external consultant, internal consultant, internal change agent) _____
26. Makes sound judgments about when to focus on changing/strengthening the organizational culture and when to focus on increasing individual competence; also how to relate both. _____
27. Demonstrates a working knowledge of a variety of theories of congregational/organization development, leadership and management, etc. _____

28. Introduces theory in an appropriate manner (fits the congregation's concerns/needs/issues) _____

GROUP DEVELOPMENT AND TEAM FACILITATION SKILLS

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

INTERPERSONAL AWARENESS AND SKILL

40. Understands his/her own facilitation style and its effect on people. _____
41. Maintains clear and appropriate boundaries and connections with the people with whom she/he is working. _____
42. Able to stay in role and also stay connected; able to be empathetic and function in role _____
43. Shows positive concern and respect for those with whom she/he is working. _____
44. Uses effective communication skills (e.g. listening, paraphrasing, active listening, itemized response, etc.) _____

SELF AWARENESS

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

PRESENTATION SKILLS

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

SPECIALIZED AREAS OF COMPETENCE

57. Clarity regarding what special areas of competence he/she brings to the ministry of congregational development. _____
58. 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 _____
- n. Other: _____

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.

- 59. Has a leadership style that is flexible enough to fit the congregation's culture and place in its organizational life cycle. _____
- 60. Demonstrates ability to clearly set and navigate in a direction. _____
- 61. 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). _____
62. Has a leadership style that empowers others; increases the capacity of individuals and teams for self-management. _____
63. Attends to his/her own spiritual life. _____
64. 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, while it also deals with its routine life and business.) _____
65. Is effective at leading in the implementation of plans. _____

CONSULTATION SKILLS

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

76. Leaves the congregation with more competence, better able to solve its problems and use its own resources. _____

77. Changes the working relationship in a collaborative manner. _____

78. 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.

	<u>Strengths</u>	<u>Need Development</u>
Congregational and Organization Development		
Theology and Spirituality		
Leader/Consultant Style		
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		

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