



Learning and Transformation

RESOURCES FOR CONVERSATIONS
FROM THE TEXAS METHODIST FOUNDATION

DOING THE MATH OF MISSION: FRUITS, FAITHFULNESS AND METRICS

Monograph 1 - **COUNTING RESOURCES AND MEASURING MINISTRY**

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The *metrics monographs* are a series of five monographs addressing the mission of the Texas Methodist Foundation to support conversations on the purpose of ministry:

1. "Counting Resources and Measuring Ministry" (Released February 2013)
2. "Getting to the Why: Turning Intentions Into Outcomes" (Released April 2013)
3. "Phronesis and the Task of Figuring It Out for Ourselves" (Released August 2013)
4. "Counts, Measures and Conversations: Using Metrics for Fruitfulness"
5. "Be Careful What You Measure"

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Our Intent: The invitation of the Texas Methodist Foundation is for you to use this monograph to support conversations of learning among leaders within your church or conference.

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COUNTING RESOURCES AND MEASURING MINISTRY

Monograph #1 in a series of five *Metric Monographs* on Doing the Math of Mission: Fruits, Faithfulness and Metrics

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*The conversation about metrics in the church is not a neutral conversation.
There is energy and discomfort at every point along the way.*

AMBIVALENCE AND ANXIETY

Let's begin with our ambivalence. The use of metrics applied to congregations is highly debated with arguments for and against. The arguments supporting metrics often focus on the need to help congregations become more missionally connected with their environment and to become more vital, with an eye to fruitfulness, to intentionally making a difference in people's lives and in their communities. The use of metrics is an effort to bring a tool to bear on mission and fruitfulness measuring whether we are or are not making the desired change. To this side of the debate, I can only say, yes.

The arguments against metrics often focus on the unfairness and ineffectiveness of holding leaders accountable for the measure of variables over which they may have only limited, if any, control and the notion that measurable goals, by themselves, do little to motivate or to bring change. The concern is that measures may simply represent institutionalism in a new garb and that it is more just and faithful to trust God to bring fruit from our efforts. To this side of the debate, I can only say, yes.

And then, of course, there are those of my friends who would simply say, "Isn't that just like a consultant to see truth in both sides of an opposing argument." Well, yes, of course. But the fact is, that there are competing truths here that are very much a part of our faith and our faithfulness. Neither truth holds sway. Neither truth overcomes the other. The presence of these two competing truths is not new for us or for those who went before. In fact, both truths appear within the distance of two chapters of each other in the Gospel of Luke. In the 14th chapter, there is a section on the demands of discipleship that call for counting, preparation, and intentionality:

If one of you wanted to build a tower, wouldn't you first sit down and calculate the cost, to determine whether you have enough money to complete it? Or what king would go to war against another king without first sitting down to consider whether his ten thousand soldiers could go up against the twenty thousand coming against him? (Luke 14:28, 31).

Clearly, the action of leaders is to be directed by measures and both the builder and the king would reasonably be held accountable for decisions made and actions taken.



However, only two chapters earlier, in the 12th chapter, there is a warning about worry and the need to trust in God for the future

Therefore, I say to you, don't worry about your life, what you will eat, or about your body, what you will wear.... Consider the ravens: they neither plant nor harvest, they have no silo or barn, yet God feeds them..... Notice how the lilies grow. They don't wear themselves out with work, and they don't spin cloth. (Luke 12:22-27).

So, which is the correct truth? Action or the absence of worry? Accountability or trust? Yes, of course.

If these two different voices can be heard only chapters apart in Luke, I would suggest that they might be found even within the same story in Matthew. In the story that I grew up knowing as the parable of the sower (known in the Common English Bible as "The Parable of the Soils") "a farmer went out to scatter seed." (Matthew 13:3) The farmer scattered seed all about - some on good soil, some on bad, some by the highway. As a result some seeds grew and others did not. From this perspective, it is a story of faithfulness. The responsibility of the farmer was to go out and sow – wherever. It was God's task to make seeds grow. Faithfulness is enough because God will make of it what God will. No measures, no goals, no accountability.

Then, there is Eugene Peterson's highly regarded interpretation of the same scripture that, in this instance, he calls "A Harvest Story." In this interpretation, the disciples go to Jesus following his story telling and ask why he tells such stories. Jesus replied:

You've been given insight into God's kingdom. You know how it works. Not everybody has this gift, this insight; it hasn't been given to them. Whenever someone has a ready heart for this, the insights, the understandings flow freely. But if there is no readiness, any trace of receptivity soon disappears. That's why I tell stories: to create readiness, to nudge people toward receptive insight.
(Peterson: Matthew 13:10-13)

Therefore, it is not a story about faithfulness without measure, but about identifying readiness -requiring measures. The disciples should learn to recognize readiness, learn to sow the next batch of seeds with those who are ready and those who are willing to become ready. It is about measuring readiness and results, about placing the word and resources of God in places where it can best grow. More than faithfulness, it is about fruitfulness – about being wise and willingly accountable to make something different happen because of the Word of God.

Intentional planning with measureable outcomes – yes, of course. Faithful ministry with trust that God will make of it what is needed – yes, of course.

When facing competing truths, one is often in a position of needing to choose which of the truths is to be supported **at the moment**. One truth does not outweigh the other, but each in its time will need attention and emphasis. One commentary on Luke's gospel, looking at the same 12th chapter referenced above, frames the text as the continuation of Jesus' project of transforming his disciples. The commentator wrote, "Still speaking to disciples, Jesus shifts to a new topic. **Knowing what time it is and ordering life accordingly.**"ⁱ



In our current moment of ambivalence, I simply affirm that it is now time for us to give our attention to the side of the competing truths that requires measures and fruitfulness. We will always be surprised by our God, whose breath will stir life even in the most deadened places. However, we do not have the luxury of not looking for ways to measure and describe vitality and fruitfulness (the richest soils in which to sow our own seeds) so that we can direct our own limited resources to those places most ready to fulfill our purpose.

If we are ambivalent about metrics, we are also anxious. In one United Methodist Annual Conference, the full body of the clergy was invited into a discussion with the bishop, about effectiveness in ministry in which the subject of metrics was an integral part. The conference had established dashboard measures that were required to be reported, by which congregations would be evaluated. All clergy had been asked to lead conversations in their congregations that focused on goals of ministry. The conversations were to include setting the metrics that congregational leaders would use in order to move the work ahead. The bishop was clear that congregations were accountable for their metrics and that the effectiveness of the clergy would be, in part, tied to the metrics which quite naturally would have consequences in considerations of current and future appointments.

The anxiety and the energy in the room were palpable during the conversation. However, the responses of the clergy were not all of one piece. There was, of course, a portion of participants who did not care for the conversation but were simply waiting for it to be over, so they could return to their congregations, where effectiveness and metrics could be ignored in the future as they had been ignored in the past. There was another portion of participants who were notably upset, because their metrics were not positive, and they were quite worried about the effect that attention to metrics might have on their futures. There was also a portion of participants who were happy to have the conversation about metrics because their own metrics were positive and because they were committed to counting, already using numbers as a tool of ministry. Curiously, there was a portion of participants, many of them young clergy, who were angry. Their anger came from listening to the bishop explain that measures of fruitfulness and effectiveness in ministry would, in the future, be given attention and used in conversations about the future of ministry for each of the clergy and each congregation. They were angry because they had assumed that such attention to fruitfulness and effectiveness was already an important practice in the conference and if, in the past, it was *not* such metrics that determined a pastor's future, then they angrily wanted to know what metrics had been used.

THE NEW WORK IS TO MOVE THIS CONVERSATION AHEAD

We have been in the conversation about metrics for some time now as our denomination has struggled to live in the changed mission field. As one considers the ambivalence and anxiety in the conversation about metrics, I think it is fair to say we are now at that point where it is unclear whether our conversations represent an effort to clarify or to avoid accountability for the work of ministry. The conversation about metrics is a worthwhile conversation for congregations and denominations to have, but we must steer our efforts toward learning much more about this new task of measurement in the wilderness, rather than simply complaining about the unfairness of being challenged with a changed mission field that makes measurements difficult.



Above all, the necessity of counting

Let's begin with the simple recognition of the necessity of counting as a responsibility of leadership. One definition of leadership is the ability to draw an accurate and honest picture of the current reality. In most contexts this cannot be done without counting. I have come to increasingly appreciate the story of a district superintendent who would begin his work with a Staff Parish Relations Committee by getting personally acquainted and then asking a series of questions about the congregation, such as: how many members do you have?; what is your average attendance?; how many children under the age of five are a part of this congregation?; how many youth from the community participate in your ministry to youth? What is the size of your budget and what percentage is supported by current giving?... and the questions would go on. The district superintendent tells of meeting with quite a few committees in which the members **did not have any answers to these questions** and in which people consistently turned to the pastor for answers, only to have the pastor take his or her best guess, without being sure. When it became clear to the pastor and committee members that they did not know the most basic metrics of their own congregation, the district superintendent would then pose the question: how could they expect to fulfill their leadership responsibility of support, evaluation and deployment of their staff, if they didn't know about the congregation itself? In order to do even their most basic tasks, leaders need to know the baseline measures of their own institution.

Of course, ministry is about more than describing present reality. Ministry is, more importantly, about some change in a person, a congregation, or a community because of the presence of Christ. Such change is the **why** of ministry and the **why** does not lend itself so easily to numbers as does the present reality of the congregation. So, having established the necessity of basic counting of those things countable, we need to go deeper. In his book on leadership from the perspective of the early church fathers, Christopher Beeley states that: "Among the many demands that leaders face, the main purpose of pastoral ministry is to guide people toward God in Christ by the power of the Holy Spirit." ⁱⁱ

In other words, at its heart, ministry is truly not about membership, organizational growth, or organizational leadership. Christianity is an alternative narrative to live - a different way of understanding one's world and living in that world that is based not on the power of the culture but on the alternative story from God that makes forgiveness more important than winning, that makes giving up control more meaningful than seeking to control others.

At the heart of ministry is the changed self that comes from an encounter with the presence and story of Christ. Such change is enabled and supported by the ancient model of the purpose of a pastor as one who provides the "cure of souls." The cure of souls is a shepherding of people in which those who need encouragement are encouraged, while those who need to be challenged are challenged. Those who need support are supported, while others who need correction are corrected. The cure of souls and the formation of the individual in faith is an individual process that needs both the support of community and the accountability of covenant relationships. All in all, none of this is easily countable stuff. In other words, the purpose of ministry is much more difficult to measure than is the way we do ministry and the resources we use to do ministry. And yet, leaders need always to start from knowing their own institutional baseline counts. This brings us to the issue of vital congregations.



ATTENTION TO VITAL CONGREGATIONS

Formation of people in faith happens in community. Disciples are made in congregations where the body of Christ invites, challenges, models, mentors, supports and provides accountability. While much that happens in the ministry of the local church is not easily countable, the health and vitality of the congregation itself is an issue of great concern because that is where formation takes place for many of us. And, the health and vitality of the congregation can, to some extent, be measured.

It is at this point that I find the work of the denominational “Call to Action” attention on vital congregations to be most misunderstood. The adaptive question proposed by the Call to Action is how the denomination can redirect resources to create more vital congregations. **Vital congregations are then defined by measurable metrics.** In order to understand our progress along this path of denominational renewal, the Call to Action work must be held in proper perspective with our denominational mission of making disciples and transforming the world.

If the Call to Action work is only about making vital congregations as its end result, as some will argue, then it is appropriately subject to charges of a new institutionalism. In a new institutionalism, the metrics of membership, attendance, baptisms and other countables are merely institutional measures giving anxious attention to needed resources.

However, I will argue that the Call to Action work is seeking to work beyond institutionalism, in a theologically appropriate way, in order to address the larger mission of making disciples. **Vital congregations are not an end result needed by the denomination.** Rather, **vital congregations are tools needed by the denomination by which mission can be accomplished.** Such congregations are not the *end* but the necessary *means* to **the true end of ministry, which is making disciples.** If Christians are formed in communities that practice and share the disciplines of Christian formation, and if the mission of the United Methodist Church is to make such disciples, then the United Methodist Church needs a number of vital congregations greater than the current 15% of our current 33,000 congregations to fulfill our purpose. The United Methodist Church must learn to redirect resources not only toward vital congregations but also away from congregations that do not evidence either the capacity or eagerness for vitality. (Indeed, this is the application of Jesus’ biblical injunction to the disciples to identify readiness as the purpose of the story about the farmer sowing seeds.) To distinguish between vital congregations and non-vital congregations we need some agreed upon descriptors, some metrics. What we have found so far in our Conference dashboard ⁱⁱⁱ measures is the **beginning place** for our work on vital congregations. We must learn much more about how to describe and measure vitality of ministry.

The fact remains that it matters whether a congregation is growing or not because growth is a primary indication of whether the congregation is or is not connected to its mission field. It matters how many people are actively engaged in the ministry of the congregation because it is an indication of whether it is a place of emotional and spiritual health that can help people grow in Christ. It matters whether a congregation has “out-aged” its surrounding mission field because it is an indication of whether it has the capacity to negotiate generational changes to be able to speak the alternative story of Christ to the new people. It matters.



The bottom line in all of this is that the purpose of a pastor and the purpose of a congregation is to **make a difference**. Because of the presence of that pastor or that congregation, over time something is to have changed - and how can we have any indication of this change if we do not, in some way, measure?

We now need a conversation that steers away from institutional requirements, defensiveness and avoidance in search of clarity and purpose. The time is ripe for us to mount a new conversation about metrics as a tool of ministry. What is now needed are discerning conversations about purpose and clear outcomes of ministry in vital congregations which are conversations about what God calls us to make different in the mission field where we are placed.

COUNTING AND MEASURING AS SEPARATE TASKS

Perhaps, when it comes to metrics in the church, it is time for us to distinguish between counting and measuring. These are both highly related, to be sure, and the distinction I will offer is, to some extent, arbitrary. Nonetheless, I offer the distinction to make the point that we have been stuck primarily in counting and feeling the limits of our stuck-ness. We now need to move on to measuring. Let's make the distinction this way:

Counting is giving attention to **numbers**. When counting, the question to be answered is "how many?" Conversations about "how many" are most frequently conversations about resources. Conversations about resources, in a time of limited resources, are commonly conversations about sufficiency - "do we have enough?" or, "how can we get more?"

Measuring is giving attention to **change**. When measuring, the question is not about "how many?" but rather about "how far?" Conversations about "how far" are frequently about the change that can be measured over time as in, "how far have we come, over the past year, toward our goal?"

There is, of course, room for, and a need for, both counting and measuring. In all complex tasks multiple tools are needed. However, like all tools, the right tool must be chosen for the job at hand. To that end, it is worth taking a deeper look at the two tools of counting and measuring as separate tools available in our consideration of metrics.

Let me begin with Edwards Deming's idea that any system can be understood as constructed of three component parts: the input (that which goes into the system); the throughput (that which the system does to, or the way the system uses, the inputs); and the output (or outcome - that difference which the system is trying to make.)^{iv} A simple diagram of such a system is as follows:



At the heart of the church's struggle to be fruitful is the common non-profit dilemma: that non-profits routinely do not know what difference they are trying to make. In other words, non-profits (of which churches and conferences are examples) do not know what outcome they are trying to produce.

In the case of our United Methodist mission, we are to "make disciples of Jesus Christ for the transformation of the world." Such a global mission is not only appropriate for our church, it is deeply needed by our world! Where the difficulty seeps in is that a *mission* for a denomination may be *global*, but the *strategies* for the mission must be *local*. In order to make disciples at the local level, leaders must be able to describe the difference required (the outcome) to move people toward discipleship.

In some congregations, the difference needed to move toward discipleship may be as basic as establishing practices of civility within the congregations that will allow leaders to make decisions through other than adversarial ways. In other congregations, discipleship may require a more mature practice of individual accountability for having and behaving with the mind of Christ in their own personal lives and relationships. The outcome appropriate to each setting of ministry, even to each individual, must be local even though it is part of a global purpose. The outcome appropriate to each setting of ministry is not the same but must be related to the specific needs and gifts of each setting or purpose. The outcome of transforming the world may be as personal as transforming the relationships that an individual has with his or her own spouse, children, co-workers and neighbors. For a congregation, transforming the world may be as local as helping the local school increase the percentage of graduates who go on to seek a college education. It may be as global as joining with others to eliminate malaria. However, whatever the outcomes of discipleship and transformation, the local congregation or conference must be able to *describe* the intended change that they believe they are called to produce, so they can talk about whether or not they are moving toward their goal.

The word "*describe*" is used intentionally in reference to outcomes because in non-profit organizations, outcomes are commonly difficult to reduce to quantifiables. A clear difference is intended and needed, but is not often quantifiable. For example, increased civility within a congregation, as necessary as it is for healthy community, is not easily quantifiable. Not being easily able to quantify a difference does not, however, release one from the responsibility of being accountable to seek making such a difference. Jim Collin's has noted that when a non-profit organization cannot quantify the difference it believes it is called to make, it must be able to richly *describe* the difference.^v Without a description there is no way for leaders to have conversation about whether they are making progress toward their outcome goal or not. With a stated outcome of increased civility, leaders can at least richly describe Wesley's commitment to holy conferencing and then ask themselves if they have had any unreasonable squabbles at board meetings in the last three months or whether they see themselves moving toward holy conferencing.

Let's now go back to the discussion of the difference between counting and measuring. **Because resources and activities are more easily counted, the temptation of non-profits, when they are not clear about their outcomes, is to count their inputs and activities.** How many members do we have? How large is our average attendance at worship? How many baptisms; confessions of faith; young people in our youth group; children in Sunday School; volunteers in mission programs? How much is our per capita giving; our budget; our debt? **These are all questions of resources and activities and they are all very countable – they are nouns and verbs.** Reggie McNeil has said that the primary dashboards for the mainline church are all about how many, how often, and how much.^{vi} These dashboard counts are commonly much more related to our inputs and throughputs, our resources and our activities, than they are to our outcomes.



INPUT	THROUGHPUT	OUTPUT/OUTCOME
Resources	Activities	The difference
[-----COUNTABLES -----]		[-- MEASURABLES --]

Outcomes are commonly much less “*countable*,” and, as noted above, must therefore be richly described. So, while somewhat arbitrary, for the purpose of moving ahead in our learning about metrics as a tool of fruitfulness, I will argue that **counting is what we do with our resources and activities, and measuring is what we need to learn how to do with our outcomes**. The distinction between these two tools that I am suggesting is as follows:

Countables are easily quantifiable. We know how many resources we have and how many activities we pursue. We can number and report these even as we argue their importance.

Measurables are more dependent on descriptions of what we feel called to, and hope to be able to produce. If we can describe the change that we are called to make, then we can also have discerning conversations about whether we are moving toward that change over time. In a later monograph, I will focus on the critical importance of these outcome descriptions. I will also identify strategies and tools available for measuring outcomes that are not so dependent upon quantifiable numbers.

Counting - Six Propositions to consider:

1. We need to count.
2. While we need to know many things about our churches that can be counted, we are limited when we over-focus on things simply because we know how to count them.
3. Many of the things that we currently count in the church turn out to be insensitive ways to quantify what we think to be important. We are counting membership in an age when people do not join organizations. We are counting attendance at a time when worship is seen as a “program option” by people deeply committed to a search for faith. We are counting baptisms at a time when parents are reluctant to make pro forma decisions that they believe should be made by their child at an age appropriate to understanding.
4. Counting is more often about resources and activities than about outcomes.
5. Counting alone often leads us to conversations about scarcity. When simply counting how many, how often and how much, the conversation naturally goes to what we don’t have – our scarcity of resources and activities in comparison to what we wish we had. What is not considered is what we might actually need if we were clear about the local and specific outcome of our ministry.
6. Did you remember #1? Despite the limits of counting, it actually is necessary to count. One cannot reasonably plan and lead if there is no awareness of resources and activities that can be used for the intended purpose. Leaders need to know their current baseline numbers.

Measuring - Four Propositions to consider:

1. Measuring focuses not on resources and activities but on outcomes -- *change*. Measuring relates not so much to what *is* but rather what *could be*. It is more about call, purpose and possibility.



2. Change is a fundamental bottom line of faith, and therefore about faith communities. People who have encountered Christ should have behavior that has been changed from those who have not encountered Christ. Christian congregations should be seeking to change the corner of the kingdom of God they have been given (their mission field) because of their faith.
3. The best questions of measure ask both about change and about time. “Over the last six months or a year, how far have we progressed toward the difference that we believe God intends us to make?”
4. Measuring is now at the leading edge of wilderness skills that church leaders need to learn in our journey into a changed mission field.

THE CONVERSATION MUST CONTINUE

While we understand counting, both its necessity and limitations, we still have much to learn about measuring in our churches and conferences. Subsequent monographs in this series will offer observations and ideas for your further consideration and conversation. Measuring requires us to think of our congregations and conferences differently and will require new instruments and techniques. It is all there for us to discover. We have made progress in the wilderness of our changed mission field; but, there are now new steps for us to take together.

For the moment, let us at least not confuse our countables and our measurables. Let us not confuse our resources or activities with our call to make both people and our world different. Let us not confuse our United Methodist institution with the purpose of our United Methodist institution.

Endnotes:

ⁱ Beverly Roberts Garenta and David Peterson (eds.) *The New Interpreter’s Bible, NIB One Volume Commentary*, (Nashville: Abingdon, 2010), 697.

ⁱⁱ Beeley, p.54

ⁱⁱⁱ A “dashboard” is a certain set of measures that is used as indicative of the overall health or operation of a system. Like automobiles that have become increasingly complex and computer driven, the number of measures of performance available is well beyond the need or comprehension of the driver to know if the car is running well or not. So, drivers learn to attend to the “dashboards” – the most essential measures that show up, quite obviously, on the dashboard. Drivers need to know if there is sufficient gas, sufficient oil, if the engine is overheating, and if there is a maintenance or equipment issue of sufficient importance to turn on the little light. If the “dashboards” indicate the right levels and do not light up the wrong icons it means all is well and the travel can continue. But with negative measures posted or warnings flashing it means that action must be taken.

^{iv} For a fuller discussion of Deming’s model and its application to the changed paradigm we now face in the United Methodist Church please see, Gil Rendle, *Back to Zero: The Search to Rediscover the Methodist Movement*, (Nashville: Abingdon, 2011), 37 – 46.

^v Jim Collins, *Good to Great and the Social Sectors: A Monograph to Accompany Good to Great*, (Jim Collins: www.jimcollins.com, 2005)4-9.

^{vi} Reggie McNeil, *Missional Renaissance: Changing the Scorecard for the Church*, (San Francisco: Jossey-Bass, 2009).

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