DOING THE MATH OF MISSION: FRUITS, FAITHFULNESS AND METRICS

Monograph 4-

COUNTS, MEASURES AND CONVERSATIONS: USING METRICS FOR FRUITFULNESS

BY GIL RENDLE
SENIOR CONSULTANT, TEXAS METHODIST FOUNDATION

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" (Released September 2013)
5. "Be Careful What You Measure"

The Strategic Direction of TMF: The Texas Methodist Foundation will help the Church become more purposeful and more clearly focused on her God-appointed mission through the integration of financial and leadership resources.

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.

COUNTS, MEASURES AND CONVERSATIONS: USING METRICS FOR FRUITFULNESS

Monograph #4 in a series of five Metrics Monographs on *Doing the Math of Mission: Fruits, Faithfulness and Metrics*

BY GIL RENDLE
Senior Consultant, Texas Methodist Foundation

Metrics is about more than numbers, and the attendant charts, graphs and statistics that can come from numbers. We North Americans are deeply marinated in the Western European enlightenment assumptions about the capacity to count and control everything through the sciences and rational logic. We believe in numbers. Numbers give solidity and concreteness to our conversations and thinking. Numbers validate our actions and decisions. We regularly turn to numbers to give direction to our actions. All of this is done, perhaps, to excess. A long favorite joke about statistics is: "Did you know that 48.6 percent of all statistics are made up?" Like all humor, there is some truth in the jest. We so believe in numbers that when we find ourselves lacking them, we invent them. However, numbers, as well as our dependence on them, have their limits.

In a February 2013, column in The New York Times, David Brooks tells the story of a chief executive of a large bank who had to decide if his bank should pull out of investments in Italy because of the weak economy and impending euro crisis.i The C.E.O. knew the numbers involved, all of which indicated growing risk. However, the C.E.O. ultimately decided to continue his bank's investments in Italy. As Brooks noted, he made his decision on the basis of values, not numbers. He did not want his Italian colleagues to think his bank was a fair-weather friend unwilling to ride out the potential crisis, even with short-term costs. He understood that the value of trust could exceed the value of numbers. Brooks went on to identify a number of areas where data struggles and provides less than we need. For example, he noted "data struggles with the social." Numbers offer little information to help us read the emotions and understand the behavior of others. Similarly, data does not do well in understanding context. The stories we tell often do better at navigating the multiple causes and contexts of our experience. And, given the context of these monographs, I might add that data, by itself, can operate without purpose. Data has the power to direct action that may or may not lead us to the end we seek. All of which suggests that in our work on metrics, we need to be able to orient ourselves in the midst of the numbers that we use, to move our congregations and conferences toward fruitfulness.

FROM DATA TO KNOWLEDGE – FROM COUNTING TO MEASURING

In the transition over the past decades from a manufacturing economy to an information economy, one of the organizational disciplines that has developed is "knowledge management." Attention to the new stature and use of information has been an important part of our move into an information economy. Above all else, what we have learned from this new discipline affirms the need for conversation and discernment about our "counting" before we can approach measures of fruitfulness.

Let's begin with basic definitions – the differences between data, information and knowledge. In their book on organizational management of knowledge, Thomas Davenport and Laurence Prusak offer the following definitions.[ii]

- **Data** is a set of discrete, objective facts about events. In an organizational context, data is most usefully described as structured records of transactions.
- **Information** is…a message. As with any message, it has a sender and a receiver. Information is meant to change the way the receiver perceives something, to have an impact on his judgment and behavior. It must inform; it's data that makes a difference.
- **Knowledge** is a fluid mix of framed experience, values, contextual information and expert insight that provides a framework for evaluating and incorporating new experiences and information.

Given this conversation about metrics in the church, data is the product of counting resources and activities. It is the simplest form of "discrete, objective facts" – structured records of transactions to be used for some further purpose. The issue central to fruitfulness of our ministry and purpose is how we move from basic data to missional knowledge. How do we move from knowing how many and how much we have, to understanding how to be healthy, purposeful and fruitful? Davenport and Prusak assert that it takes intentional work to get from data to knowledge, work they identify through a number of "Cs." We transform data into information by adding value through: contextualizing, categorizing, calculating, correcting, and condensing. In other words, we have to do additional work with the discrete, objective facts of counting data in order to understand the way in which the data should direct our judgment and behavior. It isn't enough to know our *Call to Action* benchmark numbers. We need to contextualize, categorize, and otherwise work with those numbers. Similarly, moving from information to knowledge requires additional "Cs": comparisons, consequences, connections and conversation.

All of this underlines, again, that it is all well and good, even essential, that leaders in the church count. We must know what we have to work with. We must know how we compare to benchmark standards. We need records, trends, and dashboards. And we need data about our communities and our world. But then we need to be bold in aligning ourselves with the difference which God dreams of for us, for our communities and for our world. From there we measure our way toward fruitfulness by working with our data (through contextualizing, categorizing, calculating, correcting, condensing, comparisons, consequences, connections and conversation) and work with our experience, to move toward knowledge – discerning what we are to do and learning how to do it fruitfully.

EXPANDING BEYOND THE COUNTABLES

Perhaps the most difficult work of using metrics is to move beyond the numbers - the quantifiables, to the measures – the qualitatives of "informativeness and usefulness."[iii] Learning to measure beyond easy numbers is a challenge that must be addressed well beyond the church. In an Update from the Lewis Center for Church Leadership, Lovett Weems noted:

> Church leaders may think that leading in the business world is so much simpler than in the church since there is one 'bottom line' and financial measures give business leaders all they need to know about how they are doing. Not so. A recent survey of global business leaders found that 75 percent say they need better non-financial measures. They admit struggling with inadequate metrics to deal with important components of their work not captured in dollars and cents.[iv]

The more one wrestles with the purpose of an organization, the more complex and difficult is the issue of measuring progress and fruitfulness.

Before looking at churches and conferences, let's turn again to art museums to examine the challenge. In a 2004 paper commissioned by the Getty Leadership Institute, Maxwell Anderson, research affiliate of the Center for Arts and Cultural Policy Studies at Princeton University, addressed the metrics of success in art museums.[v] He observes that, increasingly, the boards of art museums disagree about their priorities which raises fundamental questions about the metrics they are to use in assessing whether an art museum is fulfilling its goals. There was once a consensus that an art museum fulfilled its core purpose by housing a collection of art. This definition of purpose lends itself to straightforward and easily quantifiable measures: the number of items collected, the square footage of viewing space for the public, and the number of visitors to view the collection. These are, in fact, all quantifiables, easily counted and connected to resources and activities. Anderson, however, points out that basic assumptions about the purpose of an art museum have changed: "Over the last generation, art museums have shifted their focus away from collection-building and toward various kinds of attention to the public."[vi] The conversation among museum boards began to question how museums could have a positive impact on an audience and what "outcomes" are important to museums.

This is where the wrestling within the community of museums parallels the current conversation in the church. Museums were faced with a shift in which "museums must now compete with each other not for the best exhibitions and the highest attendance but, rather, to 'make a difference.'" This is not unlike the challenge in the mainline church that is facing the shift from making members (collections of people belonging to an institution) to making disciples (people experiencing a "difference" in their lives because of their connection with Christ). Interestingly, Anderson immediately states that "while [making a difference] is a worthy goal, in order to get there we first need to give art museum leaders the tools to measure such outcomes – as well as the steps they must take to achieve them. Without such tools, directors will continue to be rewarded only for excelling in conventional activities . . . as opposed to outcomes."

In fact, the shift from the easy measures of activities to the much more complex measures of outcomes is exactly the conversation sought in these monographs for the church. At this point, we are challenged to learn new ways that will require creativity. Consider the list of new metrics Anderson identifies for museums that are serious about "making a difference"[vii]:

- **Quality of Experience**
- **Fulfillment of Educational Mandate**
- **Institutional Reputation**
- **Management Priorities and Achievements**
- **Caliber and Diversity of Staff**
- **Standards of Governance**
- **Scope and Quality of Collection**
- **Contributions to Scholarship**
- **Contributions to Art Conservation**
- **Qualities of Exhibitions**
- **Facilities' Contribution to Core Mission**

While far from the easy counts of the number of items in a collection, square footage, or number of visitors, these new metrics, Anderson suggests, are very different but are, in fact, measurable. The new metrics, however, will require a creativity and inventiveness to build new tools and new conversations to measure progress toward the difference a museum is to make.

The story of leadership in art museums closely parallels the current story about leadership in congregations and annual conferences. No longer sufficient to count only dollars and people ("nickels and noses" as one bishop refers to our current baselines), we must now devise new metrics and then build the tools needed for the new measures. This task will take quite a bit of experimentation and creativity.

As one example, consider a working proposal for assessing annual conference faithfulness and fruitfulness offered by Bishop Mike Lowry of the Central Texas Conference.[viii] Bishop Lowry proposes two different kinds of categories to be measured:

#1–Vital signs of Faithfulness and Fruitfulness

In this category he notes 16 countable metrics of resources and activities that are either simple measures of strength and capacity or measures of variables related to vitality. These metrics are highly related to the *Call to Action* learning about vitality.

#2–Quality of Life Demonstrating Faithfulness and Fruitfulness

It is in this second category where, like the work needed by art museums intent on making a difference, new outcomes and new metrics of purposefulness are needed. Consider the metrics suggested for this second category and how new tools will need to be developed to measure progress.

- Developing principle-centered Christian leaders
- New churches for new people in new places and transformation of existing congregations
- Working with the poor to eliminate poverty

Beyond the hard numbers of the easily counted (which satisfy category #1), we must learn to walk into the less quantifiable, but necessary, measures that will enable us to monitor progress in areas of purpose and values (category #2).

A similar congregational example was offered in the previous monograph on phronesis. Remember that an outcome has been defined as the difference a congregation believes it is called by God to make over the next chapter of its life (three to five years). The example of an outcome of a congregation offered in the earlier monograph was:

> A local church that commits to making disciples (measured by the number of new professions of faith) or measured by an increase of civility toward others, a willingness to forgive offenses, an increase in the dependence on scripture to bring understanding to one's experience…

On the one hand, part of this outcome is easily counted. The number of professions of faith is readily countable and found in a congregation's annual statistical record. However, while making a profession of faith is a step toward discipleship, it is not the full measure of discipleship. There are other aspects of discipleship, as suggested in this example, such as civility toward others, the capacity to offer forgiveness, and incorporation of scripture in understanding life experience. The particular aspects of discipleship to receive attention depend upon what is most needed in a particular congregation. These differences, however, are also measurable. The dilemma is that these differences are of a different order than counting the number of people who have made a discrete decision. A different order of outcomes will require new tools and strategies to measure.

FROM COUNTING TO DESCRIBING

As he turned his attention from for-profit companies to nonprofit organizations, business consultant Jim Collins was clear that nonprofits do not need to behave more like a business – a poorly ascribed prescription given to too many congregations by frustrated laity familiar with business practices. Instead of behaving more like a business, Collins suggests that what is needed is for both businesses and nonprofits to behave with more discipline. The need for discipline does not disappear simply because an organization does not operate according to financial measures. Collins refers to nonprofits as organizations of the "social sector."

> In the social sectors, the critical question is not "how much money do we make per dollar of invested capital?" but "How effectively do we deliver on our mission and make a distinctive impact, relative to our resources?" . . . What if your outputs are inherently not measureable? The basic idea is still the same: separate inputs from outputs, and hold yourself accountable for progress in outputs, even if those outputs defy measurement.[ix]

Collins insists that it doesn't really matter whether an organization can quantify its results. What matters is that the leaders continuously and intentionally assemble evidence, quantitative or qualitative, to track progress toward the identified results. Measuring progress toward a necessary result that cannot be quantified requires that the result be as fully and deeply described as possible. For example, if an annual conference is to be faithful and fruitful (an inherently non-quantifiable result), then faithfulness and fruitfulness must be as richly described as possible. Without a clear description, it is not possible to measure if progress toward the goal is being made. In the example above from the Central Texas Conference, the non-quantifiable outcomes are "quality of life" issues such as developing "principle-centered leaders," "new churches for new people in new places and transformed existing congregations" and "the elimination of poverty." To assemble evidence of movement toward achieving the quality-of-life issues in category #2, clearer descriptions must be developed about what each of these issues are to look like in the future. What does a "principle-centered" Christian leader look like?

Likewise, in the example of the congregation above, once the output of making disciples moves beyond counting the number of new professions of faith in any given year, then much deeper and richer descriptions of discipleship must kick in which define the specifics of discipleship (such as civility, forgiveness, or use of scripture). In both the case of the conference and the congregation, once the intended result is richly described, evidence can be collected, and measurements can be taken to undergird conversations of leaders learning how to make the difference they believe themselves called to make.

TOOLS FOR THE CONVERSATION

We now turn our attention to a variety of tools for measuring progress toward well-described but less quantifiable outcomes. In this section a number of measurement tools or strategies will be described:

1. **Apgar scores**
2. **Self-report Likert scales**
3. **Logic models**
4. **Getting to outcome strategies**
5. **Narrative results mapping**

These are tools much less familiar to congregational and conference leaders than the act of counting. But, as this series of monographs has argued from the beginning, new tools are a necessary part of our leadership into a changed mission field that requires our willingness to experiment and learn. To that end, a few things must be said before describing the tools and strategies.

First, what is offered in this section are descriptions of basic models of tools and strategies of measurement. In a number of cases, suggestions for use and examples of how they have been used in congregations or conferences will be offered. However, like all basic models, they need to be adapted and tested for the specific situation in which they will be used. Creativity and experimentation must be the order of the day. The more that leaders use, adapt, and share their experience with these tools, and others like them, the better they will serve us in our quest for fruitfulness.

The second guide is that what is offered is not a complete list of tools and strategies. This current list is one that focuses on what is easily accessible to congregations and conferences. Others will know of, and will have used, other tools and models. The more we use and share our experience of measuring, the more we will complete the tools needed for our leadership toolkit and the more we will become practiced in measuring.

The final point to be recognized is that these are tools and strategies designed to support conversations of discernment and strategy. Unlike the quantifiable counts of congregational vitality discussed above, these new measures cannot be connected to benchmarks. There are no universal standards to measure against. In fact, these measures, unlike counts, are specifically designed for use in conversations assessing progress toward unique and specific outcomes. They answer questions of: Have we moved closer to our goal? What have we learned that will point to where we need to focus next? What have we taught ourselves about what we've accomplished already? Less important as reports of success or failure, these measures are critical for learning and discerning conversations amongst leaders. Like the Israelites, who did not follow a map in the wilderness but made the map of the wilderness, leaders need to continually track progress in order to plan the next steps.

1. APGAR SCORES

The 1980s in the United States was a time in which manufacturing and service organizations focused intensely on "quality" as the way of competing in an increasingly aggressive and demanding marketplace. Systems were built with an eye toward reducing manufacturing mistakes and increasing customer friendliness. Quality was broken down into complex components to which managers were to give attention. Programs were developed to increase quality. And, to our purpose, arguments ensued about how to measure quality. In the midst of burgeoning resources and arguments on quality, John Guaspari wrote "a modern fable" about quality in a small book with a title that brought much of the conversation back to a commonsense level: *I Know It When I See It*.[x]

There are times and circumstances in which our counting must give way to the attention that will enable us to quickly and easily see progress toward the difference we are trying to make. Simple and immediate measures can sometimes offer the focus we need to determine right away where we need to give more attention to something or whether or not we are headed in the right direction. We know it because we see it.

Such is the story of the Apgar Score, named after Dr. Virginia Apgar, the first woman to be admitted to the surgical residency at Columbia University College of Physicians and Surgeons in 1933. In the mid 1930s delivering a child was the single most dangerous event in a woman's life, with one in 150 births resulting in the mother's death. The situation was even more dire for newborns, with one birth in 30 ending in the child's death. In childbirth there is little time for complex tests, even in modern medicine, and in the 1930s, 40s and 50s, there was much less technology available to offer any tests, even if time permitted. Nonetheless, doctors and nurses needed to know if the newly born child was healthy or needed special treatment. To meet that need for information, Dr. Apgar developed a simple 0 to 10 score that enabled nurses to rate the condition of babies at birth from simple observation:

- two points if the baby was pink all over
- two points for crying
- two points for taking good vigorous breaths
- two points for moving all limbs
- two points if the heart rate was over a hundred

The baby's condition was easily rated: the nurse would know it when she saw it. The score was taken by a nurse one minute after birth, and then again five minutes after birth. A full 10 points meant the baby was born in perfect condition; four points or less indicated the baby needed immediate attention. "The Apgar score changed everything. It was practical and easy to calculate, and it gave clinicians at the bedside immediate feedback on how effective their care was."[xi]

Apgar types of scores are easily developed for congregational conversations to track progress toward a future the church feels called to live. One of my favorite consultations in the 1990s was in an Episcopal church on the east coast in which the board members regularly fought at church vestry meetings, but claimed to really like one another. The fighting was most intense around budget time when decisions had to be made about the use of money. Some on the board argued that any additional dollars above fixed expenses should be used for property maintenance and improvement to care for their facilities. Others on the board argued that those dollars should be used for mission trips and program staff to make a difference in the spiritual lives of the people who participated in the church. As in most such cases, both sides were right. There were significant needs in both of these areas.

In the midst of the consultation, I asked a group of leaders to determine what biblical story their church was currently living. Finding a church's biblical story is often a powerful way to determine the issues that a faith community is struggling with. Without a great deal of difficulty, the leaders came back with a response well worth talking about. They pointed to the story of Mary and Martha in the Gospel of Luke when, during a visit from Jesus, each of the sisters responded in very different ways. Mary sat at the feet of Jesus and listened to him talk. Martha worried and busied herself with the work in the kitchen until finally she came to Jesus with her complaint: "Lord, don't you care that my sister has left me to prepare the table all by myself? Tell her to help me." (Luke 10:38-42) "That's us," claimed the leaders of the vestry. "Some of us are worried about the dishes (caring for the facility) while others want to go talk with Jesus (the mission trips and program staff for shaping people's lives)."

After a considerable amount of agreement, which included laughter and the delight of seeing themselves in a new way, the leaders set a goal. Their goal for the next 12 months was that at every vestry meeting the agenda would reflect both Mary and Martha. They committed themselves to work together, collaboratively instead of competitively, on the agendas of both Mary and Martha – the management and maintenance of the church as well as the shaping of the lives of the members of the church. It was a commitment to develop their own spiritual leadership.

With a simple "Apgar Scale" of board leadership this group could easily and quickly take continuous measures toward their outcome of modeling spiritual maturity as church leaders:

HONORING "MARTHA" (CHURCH MANAGEMENT AND MAINTENANCE) AND "MARY" (THE DEVELOPMENT OF PEOPLE'S SPIRITUAL LIVES):	
Rate each of the following statements by placing a number from 0 ("Not at all.") to 2 ("Yes, we did.") based on your experience at this meeting.	# 0 to 2
1. We honored both Martha and Mary by giving attention to each in our meeting.	#________
2. We collaborated in our work rather than competed over attention and resources.	#________
3. We treated one another with respect and cared for our relationships as we worked.	#________
4. We listened to each other, seeking to understand.	#________
5. Our work focused on the future of our ministry rather than on the past.	#________
	Total: #________

With a simple measuring tool such, as the one above, the leaders of this congregation could keep track of their progress toward the balance of being a church that is both well managed and challenges its people to grow in their spiritual lives. Asking board members at the end of a vestry meeting to simply fill out the scale (anonymously, without signing the scale) and handing in their paper for a quick tally, along with the response of others, could give the board immediate feedback on its performance. A score of 10 would indicate they are on the right track. A score of six or less would suggest they should look again at their agendas and how they work with one another. In the case of a low score, responses to each of the five individual statements could be reviewed to see which part of their work they needed to explore further.

Apgar scores are simple tools, easily constructed, that provide a way to measure progress toward a commitment made for the future. Such scores:

1. Remind us of what we have said that is important and of commitments we have made.
2. Break our commitments down into simple observable behaviors – we know it when we see it.
3. Measure our progress, giving immediate feedback to leaders.
4. Are adaptable, if we learn that the behaviors we need to give attention to are different from those we determined at the beginning.
5. Offer suggestions for next steps (telling us to keep going if the ratings are strong or telling us to slow down and look again at what we are doing if the ratings are weak).

2. SELF-REPORT LIKERT SCALES

Likert scales are self-report instruments named after American educator and organizational psychologist Rensis Likert. Likert was best known for his research on organizational management styles. A Likert scale is a "psychometric" instrument. It measures knowledge, abilities, attitudes or personality traits by offering scaling responses in survey style. It provides a means for capturing variation. We have all used these scales in a variety of settings, and the basic form below should look familiar:

1 2 3 4 5

1 = strongly disagree
2 = disagree
3 = neither agree nor disagree
4 = agree
5 = strongly agree

The Likert scale is simply a statement which the respondent is asked to evaluate <u>according to any kind of subjective or objective criteria</u>. As such, it is a "self-report" instrument – it reports on our own perceptions and judgments and, therefore, is subject to a number of distortions: central tendency bias, acquiescence bias, social desirability bias. Nonetheless, it is an invaluable tool of direct feedback, making our perceptions and judgments transparent to us in a way that allows for conversation and decision-making.

Let's look at three examples of uses of Likert scales in the church:

- Feedback on community life
- Feedback on personal change
- Feedback on alignment with values

Feedback on community life

Likert scales can be very helpful in church (or conference) surveys. However, a note of warning before proceeding. Surveys have most commonly been used poorly in congregations in two ways: seeking information about participant preferences; and seeking to sidestep leadership decisions by looking for consensus.

Surveys are problematic when they seek information about preferences (What kind of church music do you most enjoy? Does the preaching in our church meet your needs?). Preferential surveys invite conflict and subvert mission. When asked about preferences, and when people register their preferences, they have a reasonable expectation that their preferences will be followed. Surveys tend to simply measure the differences that are held in a congregation and set people into win/lose categories around their preferences. Such surveys subvert mission because they focus on what people prefer, rather than what is required to accomplish a missional outcome.

Similarly, surveys used to sidestep decision-making (What time should the new contemporary service be held on Sunday? Should our church hire a part-time youth worker?) divide the community into competing factions. Decisions belong to leadership and should be made on the basis of purpose and outcomes, not on popular vote. Being able to offer a clear, missional reason for why the time of a worship service will change or why a part-time youth worker will be hired will garner more support by helping people see the bigger picture than will a testing of consensus to see which is the safer path to take.

That being said, a survey of participants in a church or a conference can be a very helpful tool when it seeks to measure non-quantifiable variables of importance to the mission of the church. For example, in an earlier monograph I noted a study on church growth by the Hartford Institute for Religion Research published by Kirk Hadaway.[xiii] This 2010 survey identifies a number of issues and variables critical to congregations who see their mission as connecting to their mission field and reaching out to new people through church growth. However, unlike the metrics of the *Call to Action,* these variables are not easily quantifiable. Vitality of worship, clarity of mission and purpose, and congregational identity are three variables critical for growth that, while not subject to counting, can be measured. The use of a self-report Likert scale in these areas can provide church or conference leaders valuable information about how these variables are currently perceived in the congregation. Such information offers help in determining where leaders should put their efforts in order to connect themselves to the mission field. Consider a Likert scale, developed with the information from the *Growth 2010* research study, which would provide measures on these key areas:

A SURVEY ON OUR CHURCH

Directions: Please circle the number on each scale that most represents your personal agreement to each statement.

1 = strongly disagree 2 = disagree 3 = neither agree nor disagree 4 = agree 5 = strongly agree

Purpose and Missional Clarity:

1. Our church has a clear mission and purpose.

1 2 3 4 5

2. Our church is spiritually vital and alive.

1 2 3 4 5

3. Our church is a "moral beacon" in our community.

1 2 3 4 5

4. We are different from other churches in our community.

1 2 3 4 5

Our Theological Identity:

5. Our church is theologically conservative.

1 2 3 4 5

6. Our church is theologically liberal.

1 2 3 4 5

7. Our church has no clear theological identity.

1 2 3 4 5

Our Worship is:

8. Joyful

1 2 3 4 5

9. Innovative

1 2 3 4 5

10. Inspirational

1 2 3 4 5

11. Thought Provoking

1 2 3 4 5

12. Filled with a sense of God's presence

1 2 3 4 5

Each of the statements above is based on findings from the *Growth 2010* research. The report indicates that one of the stronger correlates of growth was the extent to which a congregation has a clear mission and purpose. In the area of congregational identity, the report indicates that the level of growth is greatest on the two ends of the theological spectrum: very liberal and very conservative. This suggests that a clear theological identity may be a descriptor of vitality. It would be very helpful to pastors and leaders to know what, if any, theological identity their congregation claims. The report identified a number of descriptors of worship that correlate with growth (numbers 8, 9 & 10 above correlate very strongly with growth; numbers 11 and 12 correlate less strongly). Rather than asking people their preferences in worship, consider how much more helpful it would be to leaders if they had an idea of how people perceived their current worship, as described by characteristics deemed significant by research. Consider how helpful to purposeful conversation it would be if leaders of a church read the *Growth 2010* report together and simultaneously measured where their own congregation perceived itself to be on a scale of the variables identified in the report.

Such non-quantifiable measures can enable leaders to focus their conversations on issues and variables of their community life that are known to be important and can help shape the questions of leaders about the work they must do in the future. Consider the potential for leaders to receive the feedback on a scale such as the one above from everyone who attends worship on a Sunday morning. Consider, further, the opportunity of asking the last 30 new members/participants to complete the scale separately so that their composite scores could be compared to the longer-tenured members/participants.

Feedback on personal change

A primary task of a congregation is to shape people as disciples of Christ, to change people's lives. The example used several times in these monographs is a congregation that has determined that the outcome needed in their individual church is to influence people's civility, their capacity for forgiveness, and the use of the discipline of scripture reading and study to bring perspective and meaning to people's experience. In a congregation that has a short or long-term history of conflict, gossip, holding grudges, and self-absorption, a diagnosis by church leaders to address these particular practices of discipleship would be more than reasonable. The pastor might intentionally plan worship and sermons to address these themes. The church could name a theme that would highlight discipleship and these specific practices as important in the life of the church. Adult education leaders could seek resources to focus on these issues of Christian life. Small groups could be asked to address these issues in their meetings.

Contrary to many people's assumptions, changes in such areas in a person can be measured, if one allows for self-report information that can come from a Likert Scale:

A SURVEY ON MAKING DISCIPLES IN OUR CHURCH

Directions: Please circle the number on each scale that most represents your personal agreement to each statement.

1 = strongly disagree 2 = disagree 3 = neither agree nor disagree 4 = agree 5 = strongly agree

My participation in this church over the past six months has helped me:

1. to deal with others more kindly with understanding.

   1 2 3 4 5

2. to ascribe the best of motives to people with whom I disagree rather than the worst of motives.

   1 2 3 4 5

3. to forgive hurts and grievances from others rather than to carry them in my heart and feelings.

   1 2 3 4 5

4. to increase my regular use of scripture to help me understand my experiences and decisions.

   1 2 3 4 5

5. to give more attention and time to others in my life who need my help.

   1 2 3 4 5

6. to increase my financial giving to meet other's needs rather than to meet my own satisfaction.

   1 2 3 4 5

Serving multiple purposes, the development and use of such a tool:

- Helps clarify to leaders, members and participants what discipleship specifically means at the present moment in this particular congregation.
- Describes the intended outcome of the ministry of this church very richly and deeply at a behavioral level.
- Provides leaders the opportunity to have conversations around whether their church is making a difference in the lives of its members and participants.
- Reminds members and participants in the church who complete the scale of what is important in the discipleship of people in this church at the moment.

In addition, asking people to complete the scale a second time six months later can give evidence of whether the worship, preaching, teaching and modeling of leaders is moving the church toward the outcomes identified. It can offer evidence of whether people's lives are being changed or not.

Feedback on alignment with values

One of the key ways in which leaders must measure their own work is by the extent to which they are actually behaving in ways they believe they must in order to produce the difference they are called to address. The change required in many congregations and conferences goes well beyond decisions about programs or simple next steps. The change needed is much deeper, often referred to as organizational "culture change." In order to live into the new and changed mission field, fundamental and familiar norms will have to be changed. Such change is difficult to quickly measure but can be guided by the development of core values for the leadership team to both follow and model for others. Core values are a way for an organization to tell itself what is most important and how decisions are to be shaped in order to accomplish what is most important. The new cultural mission field is now so different and complex that it is not always clear what is the most effective and fruitful thing to do. It is a time in which we need to risk trials and experiments to find our way forward, meaning that we are not yet sure about what works. However, while what to do may not be clear, we can determine *how* we must do things and *what values will guide our step*s to signal that we are, at least, headed in the right direction.

In the Arkansas United Methodist Conference, leaders developed very clear core values which indicate both what values must guide their planning and decisions, as well as what values must not guide their future. For example, one of their four core values is:

> Establishing the mission field as the primary place for our attention and resources instead of directing most of our attention and resources to the institutional needs of congregations and clergy.

The "instead of" (a phrase repeated in each of their four core values) is a constant reminder to leaders of how they must now make decisions for the future and how they must break patterns of decision making from the past.

Once core values are identified, it is possible to measure progress in following the paths described by those values. Consider the following work by the Louisiana United Methodist Conference. After describing the preferred future they believe God calls that conference to live, the leaders of the conference identified the core values that must guide their work as leaders. Their opening statement of "In order to live into our vision for our preferred future, we will live and lead with…" is a reminder that, as they search for what they must *do* for a fruitful future, they do know *how* they must make their decisions and direct their resources.

What follows is the statement of the Louisiana core values and the Likert scale they developed on the basis of those values. The scale, in modified form in this example, is a tool available to remind leaders of the criteria they are to follow. Importantly, the scale offers brief descriptions of behavior that exemplify each of the values, so that leaders can "know it when they see it." Finally, the scale can be used to ask the responder to rate their individual or their group performance in being guided by their values.

CORE VALUES OF THE LOUISIANA CONFERENCE

In order to live into our vision for our preferred future we will live and lead with…

Integrity. We will describe honestly what we see; seek to do the right thing for missional reasons; be forthright and transparent in what we do.

Accountability. We will measure our actions and decisions by their connection to the purpose of our mission and we will be accountable to others for this connection to purpose.

Unrelenting love for all people. What we do will be for people (in, out & beyond), not for institution, buildings or budgets.

Courage and risk. New times call for new actions that will move us ahead, even though we may not always be right and will need to learn our next steps from our experiments of risk.

And holding nothing sacred but the mission. We will "put all things on the table" for consideration/ reconsideration in order to serve the mission.

The following modified Likert scale is based on the above core values:

THE FOLLOWING MODIFIED LIKERT SCALE IS BASED ON THE ABOVE CORE VALUES:

1 = Not at all 2 = Sometimes 3 = Generally 4 = Most of the time 5 = All of the time

CRITERIA	EXPLANATION	RATING:	1	2	3	4	5
Integrity	I describe honestly what I see.						
Integrity	I seek to do the right thing for missional reasons.						
Integrity	I am forthright and transparent in what I/we do.						
Accountability	I measure my actions by their connection to the purpose of our mission.						
Accountability	I am accountable to others for this connection to purpose.						
Unrelenting love for all people	What I do is for people (in, out, and beyond the church), not for institution, buildings, or budgets.						
Courage and risk	I engage in new actions (smart risks) to move us ahead even though I may not always be right.						
Courage and risk	I learn next steps from my experiments of risk.						
Holding nothing sacred but the mission	I "put all things on the table" for consideration/reconsideration in order to serve the mission.						

TOTAL RATING: ____________________

0-9	10-18	19-27	28-36	37-45
Unsatisfactory	Improvement Needed	Competent	Highly Effective	Outstanding

Consider how helpful feedback on how well leaders are aligning their discussions and decisions with guiding core values can be when it is not always clear what the right or best decisions must be. With such a tool in place, leaders can take a few minutes at a meeting every several months to complete the scale to ask "How are we doing?" It is an important tool to keep leaders on track – and to model for others what is important. Perhaps even more helpful, leaders can use the scale at the end of a particularly difficult or contentious time to ask "How did we do?" Immediate feedback after difficult situations can be invaluable in keeping leaders oriented to their purpose. Examining the collated responses from the tool can even help leaders identify which of the values they best follow and which they most struggle with. We can, indeed, measure our progress in the wilderness.

3. LOGIC MODELS

The logic model is perhaps the most widely used outcome model of nonprofit organizations. It is a diagrammatic representation that provides a road map for a given program or initiative, showing what the program or initiative is meant to do, with whom, and why. The model generally includes:

- Target group(s): the individuals, groups or communities to receive the program
- Resources to be brought to bear on the targeted problem: personnel, volunteers, physical resources, financial resources, information on target group needs, etc.
- Activities: action steps required to achieve program outcomes
- Components: group of conceptually related activities, such as educating, social marketing, etc.[xiv]

This tool is most useful at the earliest stage of a project because it allows people to grasp, at a glance, the goals and strategy of a program or an initiative. Making the logic of the project, as well as the resources and activities needed, transparent from the very beginning allows leaders to test the face validity of the plan – does it make sense? From that point, as the leaders begin to get experience with the project, they can review the logic model periodically, testing its effectiveness: Do we see the change happening? Do we have any evidence or stories to confirm what we thought would happen? What have we learned that will shape our next steps?

Consider the example of a church seeking to reach out into their community missionally, both to serve the needs of the community and to open their doors to new people. This church has an elementary and middle school immediately across the street. After some homework, church leaders became aware of stresses on families in the community that impact the education of the children. On the following page is an example of a logic model showing how that church could approach their sense of call – that God's vision for their neighborhood is more than is currently experienced and their conviction that their church could make a difference.

RESOURCES & ACTIVITIES	**IF** – we invest our pastor's time in working with the school principal **IF** – we invest our volunteers and pastor as daily greeters to the school as parents drop off their children **IF** – we make our buildings available for school meetings with the community **IF** – we provide banners on church property making our support of the school public to all who go by
OUTPUTS	**THEN** – children and parents will identify us as a friendly place of help **THEN** – children and parents will identify our pastors and volunteers by name **THEN** – children and parents will become familiar with our buildings and will not hesitate to come here **THEN** – families will use us for help when they have a need **THEN** – we can either meet their need with our own resources and support, or refer them to another place of help
OUTCOMES	**THEN** – families in our community will be stabilized and children's education improved as evidenced by the: ■ reduced percentage of single-parent families in the school system ■ increased percentage of students passing to the next grade level

With such a logic model in place, the intent of the program is clear to decision-makers in the church, as well as to the volunteers who will be asked to support the project. With such a logic model in place, it is easier for church leaders to speak with the principal of the school to identify their intent and seek support and clarification on what boundaries they need to honor between the church and the school. With such a logic model in place, there is a known reason for the pastor to spend a portion of his/her time at the school, a reason for leaders to expend resources to support the project. Most importantly, with such a logic model in place, measures toward the goal can be taken. Leaders can ask for evidence/stories of connections being made, of people seeking help, of agreements of relationship between the school and church, and evidence of a change in the percentage of single-parent families and the percentage of students graduating to the next grade. Multiple measures can be explored to mark progress toward the outcome. The measures taken will guide next steps. If progress is being made, the efforts continue. If little evidence of progress is available, the logic model can be revisited to ask what more must be learned or what additional steps should be tried.

4. GETTING TO OUTCOME STRATEGIES

A variation of the logic model above is the "Getting to Outcomes" strategy which is identified as an "empowerment evaluation model."[xv] This variation of the logic model uses a series of connections that link problems or needs to be addressed with the actions and resources needed. The model was developed for work in substance abuse prevention through the National Center for the Advancement of Prevention.

The heart of this strategy is a set of ten questions, each built around a specific focus intended to incorporate the basic elements of program planning, implementation, evaluation and sustainability. The focus of each question is the same as that developed by the National Center for the Advancement of Prevention. However, the language describing some of the elements has been changed to make the questions a bit more church friendly.

1. Needs/Resources: What underlying needs and resources are required?
2. Goals: What is the outcome, the difference we believe God calls us to make?
3. Best Practice: Where can we turn to learn from others how to address this outcome? Who, or what resource, can help us learn from the experience of others?
4. Fit: Does our outcome, and the strategy we are using, fit with the people we want to work with? Is it appropriate, will they be able to accept what we are trying to do?
5. Capacities: What organizational capacities are needed to implement the program? Can we actually do this, and what will it require of us?
6. Planning: What is the plan for this program? (the logic model)
7. Process Evaluation: Does the program have steps that fit together well? Is the process we are using integrated?
8. Outcome Evaluation: How well is the program working?
9. Quality Improvements: How will we continue to learn from what is happening and make the necessary changes and adjustments?
10. Sustainability: If the program is successful, how will it be sustained?

The use of this set of questions from the Getting to Outcomes strategy is a good road map for planning. The questions cover the basic issues that a congregation needs to take into consideration when planning to make a difference in their community, in the lives of people in their church, or their mission field. For example, in a previous monograph I used the example of a congregation that planned a street fair designed to build a bridge to their community and introduce church members and neighbors to one another. Their plan failed because almost all of the "invitations to the fair" were done on Sunday morning during worship announcements when the intended invitees were not present. A simple review of the fit question – Does our strategy actually fit with the people who are the target of our outcome? – would have saved the congregation wasted resources and the pain of failure.

This same set of questions is equally valuable as a measure of progress toward a targeted outcome. Reviewing the questions periodically can provide a structured way of measuring progress. Too frequently congregations and conferences begin an initiative and wed themselves to the first strategy chosen to do the work. The only measure commonly used, then, by congregations and conferences is: did our effort work or did it not? This is a yes/no question which produces a judgment of success or failure but does not offer any information to help leaders learn how to adjust their efforts for better fruitfulness. Rather than asking the yes/no question of whether the effort did or did not work, progress toward the outcome can be progressively measured by using the set of ten questions to ask what has been learned so far about each of these separate items and what adjustments need to be made.

5. NARRATIVE RESULTS MAPPING

In "narrative results mapping" we finally enter into an area that has long been problematic in the work of nonprofits where results are not easily quantified. Almost every effort at producing change or helping others can be supported by a story or two of how the project succeeded. So nonprofits often turn to stories to talk about their work. This is anecdotal evidence. It is non-quantifiable evidence of success often not verifiable and is most commonly told from the observer's position with no confirmation from others.

Anecdotal evidence, as used by most non-profits, is commonly a collection of the wrong stories told for the wrong reasons. Most often these stories are told for the purpose of persuasion. The intended impact of the story is to invite people to believe in the importance of what is being done, or to get people involved in the effort, or to solicit resources for the effort. The intended bottom line of the storytelling is to proclaim – "Look, it's working!" – and, therefore, it is worthy of your belief, involvement, or support. Most commonly, anecdotal evidence is a collection of success stories of change that may, or may not, be the result of the work toward an intended outcome. An additional concern is that anecdotal evidence is typically a story about the people involved, not about the process or strategy that is used to try to make a difference.

As such, anecdotal evidence is best used to establish the <u>need</u> for taking up some work to produce change, but not for measuring progress or the results of change. For example, my last congregation was located in an urban area with a large number of homeless people. The community was eager to provide programs and resources for homeless women and children but not willing to offer help to homeless men. The work ethic of the people in this city was such that they intuitively believed that if a man was homeless, then it must be his own fault. The unspoken conclusion was that he must have done something wrong or been lazy. No such judgment was placed on women and children because they were more easily seen as dependent and less responsible for their own care. To help clarify the need for helping homeless men, a few volunteers collected stories from men who slept under a nearby bridge. The most powerful story was about a man who had a full-time job and went to work everyday despite his living situation. However, he and his wife were separating in an unhappy marriage. He could afford only one apartment on the money he earned, which he gave to his wife and child in order to care for them. He then was homeless. It was a powerful story that broke through the community myth of the lazy wrong-doer and, indeed, convinced the community to initiate help for homeless men. Anecdotal stories can be powerful to <u>help people see a need</u>.

Stories of the lives of these homeless men, who then used the program that was subsequently developed, were not equally powerful indicators of the success of the program nor measures of whether the program was succeeding. Anecdotal stories collected for evidence of effectiveness are routinely collected without any established set of criteria that relates to the program being measured. Ordinarily, they cannot be compiled to support any coherent argument for or against a program. The stories lack causal connection – because it is often very difficult to establish that the difference observed in the story was the outcome of the program being measured. For these reasons, anecdotal evidence is not usually valued in assessing non-profit work. Funders are suspicious of anecdotal evidence because they know it does not measure effectiveness or project future development toward effectiveness.

Nonetheless, stories are powerful learning tools and, used wisely, can provide exactly the kind of measure needed for the metrics of ministry. Interestingly, Wade Clark Roof spoke of religion and narrative in his 1992 presidential address to the Religion Research Association, a group oriented and skilled in numbers-driven tools of research. In his defense of stories, Roof pointed out that "narrative is motivated by the drive for coherence. Stories have great capacity to bring things together, to sharpen the focus, to help us see things differently."[xvi] Such coherence is at the root of the strategy of "results mapping," which was developed by Dr. Barry Kibel as an evaluative tool using stories to systematically capture the information found in non-quantifiable anecdotal evidence.[xvii]

The basic idea of this strategy of measurement is to use the "top few stories" of the organization's work to understand the strengths and weaknesses of a program designed to produce an identified outcome. Kibel assumed that the best stories contained information about what was being done right if the story could be traced from the first interaction between the program and the "client," and each subsequent step in the contact could be reviewed for effectiveness. For example, let's return to the earlier discussion of the church that wanted to change the stability of families in their neighborhood through a relationship with the school across the street. The quantitative metrics they identified for their work were the percentage of single-parent families in the neighborhood and the percentage of students graduating to the next grade level. However, they did not have direct influence over those metrics, and being able to assess the progress of their strategy beyond those quantifiable metrics was important for them to believe they were on the right track.

Using a few "top stories" of their efforts, the leaders could trace the known specifics of their encounter with neighborhood families from first contact to the point of making a difference – as indicated by a family seeking counseling from the pastor or a family becoming participants in worship and Sunday school. A "top story" can be reviewed to look at all of the specific connections. How did the volunteers who opened the car doors for the children when their parents dropped them off at school learn the child's name and start the relationship? How did the pastor and volunteers move relationships from learning names to conversations in a brief time? What helped the children and parents connect these friendly helpers they met to the church across the street? How did the meetings between the pastor and principal build collaboration that made the encounter with this family richer? When did this family first enter the church building? Who in the family initiated contact with someone in the church in order to seek help, who did they contact, what help was requested? . . . and so, the steps of the story could be traced for evidence of progress toward the church's outcome and for information that could improve their efforts.

Results mapping can be an effective tracking device. Note the significant difference in the kind of story that is most helpful. Most often we tell stories about the <u>people</u> we are trying to help. As noted above, these stories may be helpful in proving the need for the work we feel called to. However, the "top stories" that are important for measuring progress do not focus on the people helped but rather on the <u>process</u> of our strategy for helping. There is evidence in the story of our process that a strategy or action can or cannot move people in ways we feel called to influence. A review of the specific connections between actions and contacts in the top story can confirm what works well and point to places where we need to rethink and change the approach we are taking.

FROM COUNTS TO MEASURES TO CONVERSATIONS

Counts need to move us to measures, which need to move us to conversations. Peter Drucker wrote:

> The "non-profit" institution neither supplies goods or services nor controls. Its "product" is neither a pair of shoes nor an effective regulation. Its product is a changed human being. The non-profit institutions are human-change agents. Their product is a cured patient, a child that learns, a young man or woman grown into a self-respecting adult; a changed human life.[xviii]

A changed human being is the most important "product" of a congregation or conference that seeks to offer health, hope, and meaning. However, such a product is exceedingly difficult to measure. The dilemma is that without measures of change – if we cannot have conviction that what we do actually moves us toward making disciples and changing the world – our churches and conferences are left simply as places busy with their activities, worried about their resources, and unsure if all of the activity and worry has any purpose.

We need to faithfully count. We need to move beyond counting to measuring our progress in the wilderness. Small churches and small projects must learn how to use the tools here (and others) in appropriate, informal ways to bend their conversations toward purpose. Large churches and large projects must learn how to use the tools here (and others) in appropriate, formal ways to also bend their conversations toward purpose. Large and small, formally and informally, we must experiment and learn until we know to talk about what God has called us to do rather than to talk only about what we do when we are busy.

How do we move data to knowledge? How do we move activity to fruitfulness?

Endnotes

[i] David Brooks, "What Data Can't Do," *New York Times* (February 18, 2013).

[ii] Thomas Davenport and Laurence Prusak, *Working Knowledge: How Organizations Manage What they Know* (Boston, Harvard Business School Press, 1998) 2-6.

[iii] Ibid. 4.

[iv] Lovett Weems, "The Tussle Over Metrics," *Lewis Center Update* (5/2/12).

[v] Maxwell Anderson, "Metrics of Success in Art Museums," *Los Angeles: Getty Leadership Institute* (2004).

[vi] Ibid. 2.

[vii] Ibid. 9.

[viii] Bishop Michal Lowry, "Assessing Conference Faithfulness and Fruitfulness"

[ix] Jim Collins, "Good to Great and the Social Sectors," www.jimcollins.com (2005) 5.

[x] John Guaspari, *I Know It When I See It: A Modern Fable About Quality* (New York: AMACOM, 1985)

[xi] Atul Gawande, *Better: A Surgeon's Notes on Performance* (New York: Henry Holt & Co., 2007) 190.

[xii] Gil Rendle and Alice Mann, *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations* (Bethesda: The Alban Institute, 2003) 211-216.

[xiii] C. Kirk Hadaway, *FACTS on Growth: 2010* (Hartford: Hartford Insitute for Religion Research, 2011).

[xiv] Robert Penna and William Phillips, *Outcome Frameworks: An Overview for Practitioners* (Rensselaerville, The Rensselaerville Institute, 2004) 35.

[xv] Ibid., 67-68.

[xvi] Wade Clark Rook, "Religion and Narrative," (*Review of Religious Researc*h, Vol. 34, No. 4, June, 1993) 3.

[xvii] Penna and Phillips, 74.

[xviii] Peter Drucker, *Managing the Non-Profit Organization: Principles and Practices* (New York: Harper Business, 1990) XIV.