

Realistic and Hopeful:
Baptist and Presbyterian Experience of Clergy Review in New Zealand

Vivian F. Coleman

M. Bus.

2015

Realistic and Hopeful:
Baptist and Presbyterian Experience of Clergy Review in New Zealand

Vivian F. Coleman

A thesis submitted to Auckland University of Technology in partial fulfilment of the
requirements for the degree

of

Master of Business (M Bus)

2015

School of Business

Abstract

This qualitative research study utilises Grounded Theory Methodology to explore the “salient features of clergy review” in NZ Baptist and Presbyterian denominations, by contrasting Human Resource Management practices in churches with the wisdom of the business world. In a turbulent social environment, churches need self-aware, collaborative, future-focussed leaders to bring human capital to their organisation and the wider community. Using interviews with clergy, as well as organisational documentation and policy, a theoretical construct, ‘the pastoral tie’ is developed to describe and interpret the ministers’ experience of review, and of the practices of the churches involved. This is centred upon the concept of review as conversation, a model which enables respectful and trusting communication about church and clergy needs and development. A key finding of the research is that clergy review can be strategic both for the individual and the organisation, by contributing to effective management of qualified, knowledgeable, and committed human resources. Appropriately-nuanced ministry review processes can bring positive affirmation, challenge of inadequacies, acquisition of new skills, and appraisal of the pastor-people fit. When well-timed reviews are both “realistic and hopeful”, they can support ministry effectiveness and longevity, and help answer important organisational questions about the present and the future.

Table of Contents

1. Introduction	12
1.1. Thesis structure.....	16
2. Ministry Work and Human Resource Management	18
2.1 Ministry as Work.....	18
2.2 Ministry as Calling	22
2.3 Changing Society	23
2.4 Managing Performance	24
2.5 The Social Sector	27
2.6 Managing Clergy	28
3. Research Design.....	31
3.1 Research Area.....	31
3.2 Philosophical Stance and Theoretical Assumptions.....	33
3.3 My Research Background	35
3.4 Researcher-Researched Relationship	36
3.5 Ethics.....	38
3.6 Methodology and Methods	39
3.6.1 Choosing a Methodology.....	39
3.6.2 Grounded Theory Methodology	41
3.6.3 Methods: Document Analysis.....	42
3.6.4 Methods: Purposive Sampling	43
3.6.5 Methods: Clergy Interviews.....	44
3.6.6 Methods: Interview Analysis	46
3.6.7 Methods: Theory-building.....	49
4. Evaluation of Clergy	55
4.1 History and Practice of Evaluation of Clergy.....	56
4.1.1 The Roman Catholic context.....	57
4.1.2 The Anglican context	57
4.1.3 The Methodist context	58
4.1.4 The Reformed context (includes Presbyterians).....	58
4.1.5 The Baptist context.....	59
4.2 Findings on Evaluation of Clergy in two New Zealand churches.....	60
4.2.1 The New Zealand Presbyterian Church context.....	60
What happens in a review?	63
Termination of a ministry role.....	66
4.2.2 The New Zealand Baptist Church context.....	67

What happens in a review?	73
Termination of a ministry call.....	76
5. Interview Findings	78
5.1 Clergy Review Conversations.....	78
5.1.1 Presbyterian Experiences of Review:	79
5.1.2 Presbyterian Concerns.....	80
5.1.3 Baptist Experiences of Review:	81
5.1.4 Baptist Concerns:.....	81
5.2 Formation	82
5.2.1 Spirituality	83
5.2.2 Self-Awareness	83
5.2.3 Mental Health.....	84
5.2.4 Study	85
5.2.5 Supervision	86
5.3 Collaboration	88
5.3.1 The Review Panel:	88
5.3.2 Sharing the Review Findings	89
5.3.3 Working with People	90
5.4 Imagination	91
5.4.1 Parish Reviews.....	91
5.4.2 Shaping a Congregational Vision	93
5.4.3 Experiencing God.....	94
5.5 Vocation	96
5.5.1 Presbyterian Review Outcomes.....	96
5.5.2 Terms of Call.....	97
5.5.3 Testing the Call	98
5.6 Summary of Findings.....	101
6. Discussion - Clergy Review Conversations	102
6.1.1 Ministry is Intangible	105
6.1.2 Judging and Coaching	107
6.1.3 Appreciation and Motivation.....	108
6.2 Formation	110
6.2.1 Spirituality:	110
6.2.2 Self-awareness	111
6.2.3 Pastoral Supervision	112
6.2.4 Lifelong Learning	114
6.2.5 Stress and Burnout	115

6.3	Collaboration	118
6.3.1	Gifted Teams	118
6.3.2	Trust and Transparency	120
6.3.3	Feedback Culture.....	122
6.4	Imagination	124
6.4.1	Social Change	125
6.4.2	Mental Models	127
6.4.3	Story	128
6.5	Vocation	129
6.5.1	Strategic Value.....	129
6.5.2	Motivation.....	132
6.5.3	Incompetence.....	134
6.6	Summary	136
7.	Conclusions and Recommendations	138
7.1	Business and Church	139
7.2	Pastoral Tie Model.....	141
7.3	Trustworthiness	144
7.4	Recommendations.....	146
	References.....	148
	Appendices	163
	Appendix 1 - Digital Invitation to potential participants	164
	Appendix 2 - Participant Information Sheet.....	165
	Appendix 3: Consent Form	167
	Appendix 4: Clergy Review 2015 Indicative Questions	168
	Appendix 5: Bible References relating to evaluation	169
	Appendix 6: Participant Pseudonyms and other demographic data	170
	Appendix 7: Presbyterian Minister Job Description dated 2004	171
	Appendix 8: Samples of Interview Style, February 2015.....	176

List of Figures

Figure 1: Researcher Positionality Statement.....	37
Figure 2: Example of practical use of codes and memos.....	47
Figure 3: Miner, traveller or archaeologist? Reflections on discovery.....	49
Figure 4: Word Cloud of <i>in vivo</i> codes relating to Clergy Review.....	102
Figure 5: The Pastoral Tie of Clergy Review.....	142

List of Tables

Table 1: Summary of Grounded Theory coding process.....	48
Table 2: Identifying relationships between open, selective and theoretical codes.....	50
Table 3: Five features of Clergy Review with their selective codes.....	51
Table 4: Constructs considered for theory-building	52
Table 5: Example of question and response scale in Baptist Union pastor survey.....	74
Table 6: Relationships between theoretical constructs.....	144

Attestation of Authorship

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

A handwritten signature in black ink, appearing to read "Vira Colema". The signature is fluid and cursive, with a long horizontal stroke at the end.

December 2015

Acknowledgements

First I want to thank the participants, who were generous with their time and helpful with their stories. Without you this project could not have happened.

Second I am deeply indebted to my two supervisors, Dr Candice Harris and Dr Katherine Ravenscroft, who have provided support, wisdom, excellent probing questions and ruthless advice on editing.

Thirdly I am grateful to AUT for an excellent educational experience over five years of study.

Others whose contribution I have deeply appreciated are:

Grahame Walker for helping me write a Ministry Development Plan that launched me on this academic journey.

Marg Kitchen, for introducing me to Grounded Theory Methodology.

John McClean for many helpful philosophical conversations and introducing me to Michael Polanyi.

Staff of the Baptist Union and Carey Baptist College.

Staff at Presbyterian Church of Aotearoa New Zealand and at Knox Centre for Ministry and Leadership, and especially for the Study Grant that defrayed the considerable costs of postgraduate research.

The eight Baptist and Presbyterian “denominational insiders” with whom I consulted informally in 2014; you helped me get a grasp of how clergy pastor evaluation works in the two organisations.

ABC Secretarial in Howick whose transcripts made coding a pleasure.

Christine Mitchell who drew the Pastoral Tie graphic from my scribbles and explanation.

Ric Coleman for tolerating a messy house, with books and papers taking over nearly every room, for reading every chapter more than once to give me an idea of readability to an intelligent layman, and for sometimes helping pay my university fees and travel bills.

And God, with whom it all began.

Vivian F. Coleman, Cockle Bay, December 2015.

*This study was approved by **Auckland University of Technology Ethics Committee on 17 November 2014, AUTEC Reference number 14/362***

Glossary

Baptist Associations (e.g. Northern BA)

Network of the Baptist family in a region, offering training, resourcing, inspiration and support for local churches and pastors. There are eight regional Associations in New Zealand.

Baptist Union of NZ or BU

The voluntary national association of 240 New Zealand churches who follow Jesus Christ and share common Baptist beliefs and practices. Baptist churches are constitutionally autonomous but they choose to work together in a network of mutual support, overseeing national and international Christian ministries and social initiatives. Historical roots are the English Baptists of the seventeenth century.

Carey Baptist College

The tertiary institution associated with the Baptist family of churches in New Zealand and situated in Auckland. Provides theological training to a wider range of users but also specific courses and internships for those selected to serve as Baptist Pastoral Leaders (PL track).

Clergy Review

Clergy reviews are defined in this thesis as “the organisational exercise of appraising the minister’s performance, undertaken at intervals of 1 – 3 years.”

Cluster

A group of six to ten Baptist pastors or other church workers who serve in similar roles in a region and meet together regularly for motivation and support.

Congregation

A group of people who gather for worship, service, and mission in a local area or other specific context. The congregation comprises members, associate members, and attenders, and in local Presbyterian and Baptist churches, the members play an important role in church governance. **Parish** is an older word, often used interchangeably with congregation, but linked with the now-dated concept of geographically-bounded responsibility.

Elder

Derived from the Biblical tradition, the word denotes non-clergy volunteer leaders elected to administer and oversee congregational life, along with the appointed minister. In many churches today, it embraces female leaders and younger people.

Human resource architecture

A framework that distinguishes categories of employees according to qualities like uniqueness and value, in order to assign appropriate Human Resource processes to support organisational effectiveness.

Kenexa

A professional Human Resource Management company, formerly John Robertson & Associates, which provides employment and retention solutions to New Zealand workplaces. A subsidiary of IBM.

Knox Centre for Ministry and Leadership

The tertiary institution associated with the Presbyterian churches in New Zealand and situated in Dunedin. Facilitates ministry formation through block courses and two-year parish internships for those selected to serve as ordained Presbyterian ministers; these graduates will have already undertaken foundational theological training at a range of other universities.

Oversight Group/Eldership

An elected group of leaders who help govern a local Baptist church. The pastor is usually a member *ex officio* and does have a vote.

Pastor, minister, clergy

Names used for paid church leaders who have undergone careful selection, professional training and a placement to provide leadership and spiritual oversight in a particular parish. Baptists

usually say 'pastor', and Presbyterians 'minister'; clergy is a generic term for a "minister of Word and Sacrament" but here is used to include Baptist pastoral leaders.

Pastoral Tie

The relationship formed between pastor and people when the leader is appointed or inducted.

Postmodern

A social milieu where truth is experienced rather than prescribed, so that emotion, intuition and spirituality are valid sources, participation, eclecticism and globalism prevail, and people communicate through images and symbols as much as through words.

Presbyterian Church of Aotearoa New Zealand or PCANZ

The national face of the General Assembly, the highest court of the 375 Presbyterian churches in New Zealand, who are also governed by regional and local leadership groups. PCANZ is made up of Christians with an outward focus, and shared leadership, who believe Jesus Christ can shape people lives today. Historical roots are the Scots Presbyterians of the seventeenth century.

Presbytery

The regional association/court comprised of all Presbyterian ministers in an area plus an equal representation of ruling elders from parishes. Local churches are partly governed through the Presbytery which also facilitates the placement of ministers. There are currently five Presbyteries in New Zealand.

Protestant and Catholic

Generic terms used for two major strands of Christian tradition emanating from the Reformation in sixteenth century Europe. Catholic refers to those churches that remained under the authority of the Roman Pope, while Protestants, beginning with the reforms of Martin Luther, evolved a diversity of hierarchies.

Quinquennial visitation

A five-yearly church and clergy review, used from ancient times. In Presbyterian churches a team from the presbytery acts as the visiting bishop. The system has now been superseded in NZ.

Resource-based view

The view in strategic Human Resource Management that competitive advantage lies primarily in the ways a firm uses its valuable tangible or intangible resources

Sabbatical

A rest from work lasting some months, traditionally offered to professionals after seven years' service. Reflects the ancient Hebrew tradition of desisting from farm work in the seventh year. In New Zealand offered to pastors of some Baptist churches but not provided for in the Presbyterian polity.

Session

The body of elected elders governing a local church in Presbyterian polity. Members of Session are the minister (teaching elder) of that congregation, and the other ruling (lay) elders. Elders make decisions for the local parish and are ordained for life but some sessions use a rotating membership. The minister usually presides as the non-voting Moderator.

Stipend

A living allowance paid to clergy so they do not have to earn income by other means. Standardised in Baptist and Presbyterian churches in New Zealand. Does not represent payment for work performed but rather applies to a lifestyle that cannot easily be measured in terms of tasks.

Study Leave

Provision in the terms of call of Kiwi Presbyterian and Baptist churches for minister to devote paid days to a ministry development study programme of their choice. 11 or 12 days a year often saved up to allow a significant time away from the parish, perhaps overseas.

Realistic and Hopeful: Baptist and Presbyterian Experience of Clergy Review in New Zealand

1. Introduction

Performance management and evaluation (=PME) is well-established as a significant component of an organisation's management of human resources (McKenna, Richardson, & Manroop, 2011). Most New Zealand businesses use a bundle of Performance Management and Evaluation practices (Boxall & Purcell, 2011; Macky, 2008). So do many churches, but the context of church ministry is very different from that of a commercial organisation (Messina, 2007). How do the insights and systems of the business sector inform the practice of clergy evaluation? The local Christian church is one form of Not-for-Profit (NFP) organisation, served by leaders known as priests, pastors and ministers; in New Zealand 5000 men and women currently name their occupation as minister (Careers New Zealand, 2014). Having been recruited, trained and tested by a Christian denomination, they are authorised to offer pastoral leadership in churches of that faith tradition. They are not guaranteed a ministry role, but most find a fit with a local congregation, where they undertake a range of religious and community tasks in exchange for a living wage (Carroll, 2006; Peyton & Gatrell, 2013). The role of a minister is "a mysterious amalgam of leadership, service, exhibition, humility, authority and accountability", where issues of denomination, culture, and gender intersect with temperament, health, and biography (Coleman, 2014).

Church ministry is a form of work, heuristic labour in a changing social context where self-management, leadership wisdom and creativity are critical (Hudson, 2004). Technological innovation is reallocating resource value, so that the soft skills of human interaction and problem-solving are increasingly sought out by organisations, including churches (Colvin, 2015). Clergy today need to be leaders, managers, listeners, talkers, custodians, change agents, shepherds, servants and students (adapted from Schmidt, 2013, p. 31). The New Zealand churches' approach to evaluating that ministry performance is not well understood, and yet has significant strategic value in light of the investment national and local churches make in their pastors.

For this thesis, a qualitative research study utilising Grounded Theory Methodology explored the "salient features of clergy review" as understood and experienced in two New Zealand denominations, through document analysis and clergy interviews.

Timetabled review and professional registration frameworks were found to work together in churches to develop and protect talent in ways that are normative for the national organisation, and formative for the individual and the local parish. The New Zealand Baptist and Presbyterian denominations, served by the 15 pastor participants, use review, registration and ongoing learning to manage clergy, and encourage ministry development goals that will enhance the work of the human talent in whom they have invested.

The business world of today has experienced local and global disruption, and churches are changing too. Postmodern followers of Jesus no longer rely on their local church for spiritual guidance and or their pastor for family nurture; they can access insight and interpretation from many real and virtual resources. Ministers can feel isolated and depressed as numbers decline, commitment fades and they engage in the difficult, challenges of dislodging outdated paradigms. If you have a new world, you need a new church. That will influence ministers' tasks, and evaluation of their performance.

Mainstream researchers in business studies often adopt a positivist paradigm, where statistics and surveys are perceived to uncover quantifiable facts (McKenna et al., 2011). The philosophical stance undergirding the 2015 Clergy Review research is Critical Realism, a view that reality is only accessible to humans through language, and perceptions created with images and words. Conversations make shared meaning out of our pasts, imagine possible futures, and help create collaborative practices (Branson, 2004, p. 37). Grounded Theory methodology, an interpretive approach to qualitative research, is a good fit with this epistemology and research paradigm; the inductive methods of coding, memoing and theory building, and the customary deferral of a full exploration of relevant literature until after the theory has been developed, were well suited to the research question: *"How is Performance Management and Evaluation understood in churches, and what are the salient features of ministers' experience of clergy reviews?"*

Ministers in New Zealand are similar to employees, especially those on salaries or fee-for-service, although the legal basis on which they are contracted is usually a covenant known as the terms of call (Burt, 2012). Pastors and ministers do not see their role as 'a job' but rather a demanding 'calling' that encompasses all aspects of their life (Burns, Chapman, & Guthrie, 2012). The notion of call, or vocation, is of particular significance to priests and pastors, and management practices in churches need to acknowledge that, at a deep level, the person feels they are working for God, and so accountability will take different forms than in the corporate sector (Messina, 2007). Instead of being motivated by market forces and commercial factors, churches are gathered around a

concern for human beings, the needs of the marginalised and the good of the community (Messina, 2007). These values will impact HR processes including Performance Management and Evaluation, protecting the church's human resources and safeguarding relationality, consistency, and compliance (Messina, 2007; Zech, 2010).

The tasks that ministers undertake and the conditions under which they work are regularly subjected to evaluation by themselves, by their parishioners, and by their organisation (Beal, 2010). In fact, the Christian tradition has much to say about accountability and responsibility (Bowater, 2008; Carroll, 2006; Jones, 2008). However it is only in recent times that the business discipline of Human Resource Management (=HRM) has been applied to church ministry, and that the intentional and unintentional Performance Management practices used with clergy have been subjected to scrutiny (Beasley-Murray, 2015b; McLean, 2000; Messina, 2007; Peyton & Gatrell, 2013).

In the 'modern' era, says Hudson (2004) an experienced ministry evaluator, businesses and churches tried to make everything measurable, using management by objectives, empirical goals and action timelines to support 'objective' evaluation. However there are nuances to effective ministry that cannot be expressed in attendance statistics or balance sheets; the postmodern world is open to other, more subjective sources of information and to meta-cognitive dimensions which are difficult to quantify. Assessing effective ministry work today is not so much about great preaching or insightful pastoral care, as it is about a behavioural repertoire that includes participation, imagination and flexibility (R. B. McKenna, Boyd, & Yost, 2007). Competencies that used to be identified and objectified for appraising ministry are now subject to complexity, context and mystery (McKenna, 2002).

Nonetheless, organisations still need structure and accountability, and church leaders must be good stewards of human and financial resources (J. Gray & Tucker, 1986; Messina, 2007). Ministers need to know where they stand, how well they are doing and what changes are called for, so they can target their self-directed professional development (McGregor, 1957). However, the standard annual Performance Review is not the panacea it once was; HR managers today often refer to the practice as the 'Achilles heel' of their discipline (Pulakos, Mueller-Hanson, O'Leary, & Meyrowitz, 2012).

A 2014 Deloitte survey of HR managers found 80% respondents felt that performance reviews are not worth the time they spend on them (Schwartz, Bersin, & Pelster, 2014). Businesses agree evaluation will always be a necessary ingredient of organisational effectiveness, but see it changing focus from a top-down interview by a 'judging' manager to a more participative feedback and 'coaching' conversation (Levy & Williams, 2004; Pulakos et al., 2012; Steinkellner, Elfriede, & Guenter, 2011). Culbert, (2010, p. 146),

who has identified many deficiencies in business practices of performance management, recommends moving from a review to a “reciprocally-accountable performance preview”, a dialogue where the focus is on the future. When the work is characterised by rare skills and worker autonomy, a conversation format is less confrontational than the standards-based measurement of mainstream HRM. Feedback builds community, in business and in church. Conversation can be a framework for negotiation, affirmation, illumination, confrontation and even alienation; a ministry review conversation can work positively for both the individual and the organisation, by engaging pastor and people in mutual commitment.

Ministers need to know what their tasks are, and the spirit in which their work is to be done, but those goals need to be shared, realistic and nuanced. “Good clergy evaluation”, says Hudson, “is less a science than an art form” (2004, p. 31). To that observation could be added:

It is less objective facts and more subjective understandings.

It is less tangible outcomes and more intangible dreams

It is less pay and promotion and more intrinsic motivation.

It is less key performance indicators and more mutual expectations

It is less competitive advantage and more stewardship of precious resources.

It is less contract and more covenant.

It is less a cost to control and more a resource to develop.

A strategic approach to Human Resource Management will mean managing human resources and protecting talent by combining policies and practices that support an organisation’s long term strategic goals (Boxall & Purcell, 2011). Strategic HRM is a system applied in knowledge-based professional service firms but it also has application in the social sector; charities and churches do not compete economically, so much as maintain relevance and effectiveness by recruiting and retaining the right people, and aligning hearts and minds with the long-term goals (Collins, 2005). SHRM involves a shift in emphasis from financial returns to a ‘resource-based’ view, where the workforce is seen as valuable talent to be protected, rather than manageable assets to be controlled (Barney, 1991; Boxall & Macky, 2009). Managing talent in the business context involves combining unique bundles of human resource practices with technical expertise to generate “enviable levels of performance” (Boxall & Purcell, 2011, p. 98). Churches, too, rely on qualified, knowledge and dedicated people who can be protected and engaged by relevant, contextual HR practices. However building “a happier, engaged and more productive workforce,” is not only an end in itself but an investment in the future of the organisation (Ringo, Schweyer, deMarco, Jones, & Lesser, 2008, p 3).

The remodelling of performance management practices to be more agile, developmental, and transparent upends traditional relationships between employer and staff (Drucker, 1993, cited in Webber, 1993, p. 27). The demand for insightful, self-aware, future-focussed talent repositions qualified and experienced pastoral leaders as valuable for both the organisation and the wider community. The rebalance of power means ministers should be able to approach a review season positively, seeing it as an opportunity to communicate about goals, identify problems, and seek opportunities for improvement (Luecke, 2006). The trouble with church ministry is that the 'talent' often do not know how valuable they are. The economic and opportunity costs involved in replacing them are considerable, but they are often treated as a disposable commodity. Their need for hopeful and realistic evaluation is sometimes usurped by a deficit of hope, and a multitude of unrealistic expectations. A review that reminds them how much they are loved and appreciated, and how their work has empowered and enriched the community, has the capacity to keep them in the job.

The 2015 Clergy Review study conducted for this thesis looks beyond the positivist HRM paradigms of predictability and best practice, by listening to other voices and helping churches be better informed of how clergy experience their evaluation. It reveals how appropriately-nuanced contingent ministry review processes can bring positive affirmation, challenge of inadequacies, acquisition of new skills and appraisal of the pastor-people fit. However, poorly-structured and erratically-timed reviews can be demoralising and corrosive, damaging the "pastoral tie" of engagement between pastor and people.

1.1. Thesis structure

Chapter Two introduces in more detail the theme of ministry as work, and how HRM insights and practices might inform that work. It encompasses a "non-committal" overview of literature as recommended for researchers applying a Grounded Theory Methodology (Charmaz, 2014; Urquhart, 2013); the main exploration of relevant literature was deferred until after data collection and analysis had taken place and is integrated into the discussion in Chapter Six.

Chapter Three explores the research question, philosophical assumptions and qualitative paradigm that led to the choice of Grounded Theory Methodology, and introduces the key features of this inductive approach.

Chapter Four completes the provisional literature review with an explanation of historical and global practices of clergy evaluation. The chapter also presents findings revealed by

the researcher's analysis of documents relating to current New Zealand Presbyterian and Baptist approaches to ministry evaluation.

Chapter Five presents the interview findings in a mixture of verbatim quotes and indirect summaries, aligned with the main themes that emerged in data analysis and theory building.

Chapter Six incorporates the main literature review, which in Grounded Theory Methodology is conducted on the completion of data analysis. The practices of clergy review applied in the Baptist and Presbyterian Church denominations in New Zealand are interpreted from the findings and related to current literature in the Management, Organisational Psychology, and Church Leadership contexts.

Chapter Seven comprises conclusions and recommendations and offers a theoretical model that can be used to explain and interpret the finding of five interconnecting constructs that influence ministers' experience of performance evaluations in two New Zealand churches.

The phrase "realistic and hopeful" occurred in a paragraph on Ministry Evaluation in Hudson (1992) and describes factors that were revealed to be particularly apposite in this study project. It has been included in the title and will be examined further in the discussion chapter.

2. Ministry Work and Human Resource Management

- *This chapter introduces the social context of a Christian church as a form of Not-for-Profit organisation, and outlines the role of its paid leaders, known variously as priests, pastors and ministers (clergy), who see their work as 'calling' encompassing all aspects of their life.*
- *The tasks that clergy undertake and the conditions under which they work is explained as a form of heuristic labour in a turbulent environment where self-management, leadership wisdom and creativity are critical, and motivation is largely intrinsic.*
- *The ways in which ministers appointed under 'terms of call' in New Zealand are similar to employees, as well as key differences from the secular employment relationship, are explained.*
- *The research area of the relevance and usefulness of applying the HRM practice of performance review to the leader/minister of a church is introduced, by defining Performance Management and Evaluation (PME) and reviewing changing practices in the sector.*
- *The chapter encompasses part of a "non-committal" overview of literature as recommended for researchers applying a Grounded Theory Methodology; the main literature search was undertaken after analysis and theory building revealed the salient dimensions of pastoral review.*

What is a church? Etymologically, it is a civic gathering, rooted in the ancient Greek word *ekklesia* (Cross, 1958a). Theologically, it is a community, a body, an army or a family (Cross, 1958a; Plunkett, 2002); New Zealanders might helpfully apply the notion of a tribe or iwi. Every year 15 - 35% of New Zealand men, women, and children give time, energy and money to attending and participating in a local Christian church on a regular basis (Bible Society Survey, summarised by Presbyterian Church of Aotearoa New Zealand, 2008b). Sociologically, a church is an organisation, bearing features of both an organism and a culture (Peyton & Gatrell, 2013). In business terms, it falls in the 'social sector' of non-profit organisations, although its members would assert that it is qualitatively different from service clubs or sports administration, because it belongs to God (Cross, 1958a; Plunkett, 2002). For tax purposes in New Zealand, churches are classed, under legislation governing Charities and Non Profits, as entities whose principal activity is "the advancement of religion". The sociologist Bergen describes such endeavours as providing "a protective canopy of transcendent legitimacy, meaning and order" to society (1967, cited in Peyton & Gatrell, 2013, p. 21). Whatever language one uses to describe a church, it is a component of human reality that entails structure, management and leadership in contemporary society (J. Gray & Tucker, 1986). The leadership function in these organisations is variously titled but can be subsumed under the name Minister of Religion (Careers New Zealand, 2014).

2.1 Ministry as Work

The role of minister is listed as a career on the Careers NZ website, where it is described as providing leadership, guidance and training for church members, though there is also

an element of community involvement (Careers New Zealand, 2014; Carroll, 2006). The church leadership role has existed for over 1900 years, since individuals in the early church were asked to undertake certain functions and tasks, based on their God-given leadership gifts (2006). These tasks include overseeing acts of public worship, attending to the pastoral care of the members, and facilitating the dissemination of the organisation's beliefs in the wider community. Today the role is increasingly seen as one of leadership - the power to envision, create, inspire, change, and control (Frank, 2002). In most church contexts this power is not granted to the minister alone, but shared with other clergy, lay leaders or the congregation itself (Cross, 1958a). Church leaders are however charged with articulation, interpretation and realisation of the faith community's deepest values and norms, as skilled custodians of its meaning (Carroll, 1991; Rendle, 2002).

In 2012 there were 4,822 people who named their occupation as minister in New Zealand (Careers New Zealand, 2014). Most are recruited by the national office of a Christian denomination, provided with targeted training and internship experiences, and authorised to offer pastoral leadership in the local churches of that particular expression of faith. They are not guaranteed a church leadership role, but instead engage in conversations with potential parishes in a careful search process whereby a match between pastor and people is determined, using a mix of practical (e.g. candidate's communication skills) and spiritual (e.g. elders' prayers for divine guidance) factors. When a fit is agreed, they are engaged (in what churches call the "pastoral tie") to undertake a range of religious tasks. The role generally includes worship leadership, preaching and teaching, pastoral care, and congregational oversight, and the ministers receive a stipend (living wage) in payment (Carroll, 2006; Peyton & Gatrell, 2013).

Pastors and ministers see their work as not 'just a job' but a demanding 'calling' that encompasses all aspects of their life (Burns et al., 2012). For legal reasons, in New Zealand and elsewhere, the ministry agreement is usually provided as a document specifying "terms of call," but there are many overlaps with employees, especially those on salaries or fee-for-service (Burt, 2012). Terms of call for senior ministers do not usually specify an end point; the temporal boundaries of the role are open, in a relationship comparable with the notion of security of tenure in other professions. Like employees, ministers are accountable; they are expected to be available at times and places (e.g. Sunday morning worship, or the home of a bereaved family) to perform certain functions, and face local or denominational sanctions if they are not. They are paid a regular income, the stipend, which is not based on a competitive market but functions more as a living wage, often determined nationally, and they can usually be

reimbursed for occupation-related spending. Many ministers work at home, from a house provided or funded by the church, and some are required to wear a clerical 'uniform' in both church and community (Peyton & Gatrell, 2013). Although they work irregular hours, including weekends and evenings, they are entitled to take days off and holidays, to attend training courses, and to access coaching or supervision to enhance their work. They are usually expected to report to a governing board, as well as, in most cases, being accountable to a professional code of ethics. Their job security varies according to denominational precepts; termination can be forced when conduct has been unacceptable or when the pastoral 'fit' fails in some other way (Croucher, 2015). While ministry in this context is not employment, where the relationship between the worker and the employer is a legally-binding contract of service, the roles undertaken by ministers are clearly a form of "work" for which they deserve to be treated fairly, with adequate remuneration and provision for appropriate leave (Burt, 2012).

Work occupies much of our lives, and is a core aspect of personal identity (Schmidt, 2013). In earlier times it was a necessity, to enable families to subsist in a harsh environment, although stratification of society into aristocrats and serfs meant the work was unevenly assigned. Industrialisation in the eighteenth century brought about clear divisions of labour, and work in that era was often viewed mechanistically, with employees being seen like animals who needed to be motivated with carrots and sticks (Boxall & Purcell, 2011). In the twentieth century, Taylorist views of workers as indolent, gullible cogs in the machine gave way, in many industries, to high-discretion agentic systems where expertise, quality and interpersonal skills are favoured (Boxall & Purcell, 2011; McGregor, 1957; Pink, 2009). "Work" as defined by statisticians had been limited to economically-productive activity, but definitions have now been broadened to include activities which contribute 'social capital', or benefit to wider society, such as housework and childcare (Martin, Hess, & Siegel, 1995). Sociologist Jackson Carroll writes about the social capital produced by voluntary organisations like churches, and names important features of this work as networks of friendship and trust, values that shape lives, and engagement in service to the wider community (Carroll, 2006). Ministry leaders contribute to this benefit in a specialised but hard-to-define way; ministry is said to be like no other job (Ministry Training Strategy Ltd, 2014). The closest parallel is running a family restaurant or farm, though the role of a school principal also has some common features (Brooking, 2007; Ministry Training Strategy Ltd, 2014).

Church leadership falls into the category of heuristic rather than algorithmic work; heuristic tasks involve experimenting with possibilities and finding a novel solution, while algorithmic jobs require a set of instructions to be followed (Pink, 2009; Vallerand,

Pelletier, & Koestner, 2008). In heuristic or knowledge work, ministers and their parishioners are motivated by autonomy, responsibility and readiness to direct behaviour towards the organisational goals (McGregor, 1957; Pink, 2009). Ministers, in particular, are skilled and visible practitioners of their faith and values:

"You are a very public person ...you have to be strong inside to be able to handle the various contexts that you are put in as a priest. For instance, I could be preparing a couple for their marriage and then in the same afternoon I could be out at a marae doing a funeral service. This means I am moving and changing where I am at emotionally. ...But it is a privilege to be a part of people's lives, ... the joy, and ...deep sadness." (Rev Brent Swann, on Careers New Zealand, 2014)

Researchers in different settings have found that despite differing language and priorities, the core functions of the pastoral role have changed little over time, and that the minister is still the "celebrant of sacraments, the preacher and teacher, the overseer of congregational life and the giver of pastoral care" (Carroll, 2006, p. 98, see also Peyton and Gatrell, 2013). More broadly, ministers act as custodians of meaning in texts and traditions, in spiritual practices and the language of metaphor (Rendle, 2002). Much of this work is discretionary, and there are many interruptions (Carroll, 2006; Ministry Training Strategy Ltd, 2014). Surveys show full-time ministers average 51 hours work a week in the US, and 56 hours in the UK, though members were often unaware of how their leader spent their time (Carroll, 2006; Peyton & Gatrell, 2013). When the minister is not in the office, they may be on a pastoral visit, engaging in continuing education, meeting with denominational colleagues, or taking time for renewal. This high degree of discretion means ministers need to be self-managers and learn to use their time creatively (Beasley-Murray, 2015b). Goals in ministry work are abstract and difficult to quantify; the fact that there is often no clear job description threatens motivation and work satisfaction (Beasley-Murray, 2015b). The irregularity and invisibility of some of their work can lead clergy to laziness, disorganisation, or deceit; pastoral ministry is said to be "one of the most unaccountable careers in our society" (Winslade, 2002, in Baptist Research and Historical Society, 2014, p. 2531). A recent study noted the additional repertoire of administrative skills needed, as pastors trained to minister 'Word and Sacrament' become "reluctant managers" of paid staff and volunteers (Guerrier & Bond, 2013). As the person "paid to come to church," they are often the one who has to dismiss unproductive workers, manage chronic complainers, and present unpopular changes proposed by the church board (Carroll, 2006, p. 12). This can have a demoralising and depleting effect on pastors who feel they have been called by God to a sacred vocation.

2.2 Ministry as Calling

Although historical and sociological analyses often define church ministry as an 'office' or a 'profession', most clergy see their role as a "calling" or vocation (Beasley-Murray, 1993; 2006; Christopherson, 1994). The word 'vocation' comes from the Latin *vocare*, to call, and originally it meant only a religious calling. Over time, it has come to mean a calling to other professions, usually where the work brings meaning and fulfilment and a sense that it contributes to making a better world (Wrzesniewski, McCauley, Rozin, & Schwartz, 1997). Good work, wherever it takes place, involves excellence, ethics, and engagement, combined with expertise and social responsibility (Gardner, Hobbs, & Hobbs, 2010). People with callings find that their work is inseparable from their life (Wrzesniewski et al., 1997). The application of the notion of calling to church leadership reminds ministers that they are expected to have both good character and a depth of spirituality (Bridger, 2003; Carroll, 2006). Churches today usually take the view that all Christians have both a calling and a ministry, as taught in the Biblical precept of 'the priesthood of all believers', but the perceptions of the role of pastoral ministry usually employ the notion of calling to a greater or lesser degree (Burns et al., 2012). A landmark typology by Richard Niebuhr in 1957 distinguished three aspects:

- the providential call, demonstrated by the possession of appropriate talents
- the ecclesiastical call, seen in the confirmation of a call from a particular faith community
- the secret call, which is the "inner persuasion or experience whereby a person feels him or herself directly summoned or invited by God to take up the work of the ministry" (Niebuhr, Williams, & Gustafson, 1956, p. 64).

A study of ministry as work then needs to encompass an understanding of call, whereby one responds to "the stirrings of the soul, the voice of God in the deepest part of us" (Brown, 2004, p 27, cited by Messina, 2007, p. 37). This precept influences the employment status of ministers, where according to UK case law, clergy have been found not to be employees because of a foundational polity that ministry work is not subject to control by the civil law (*Macdonald v Free Presbyterian Church of Scotland*, 2010). According to New Zealand law too, ministers serving in congregational leadership are not employees (Burt, 2012; *Mabon v Conference of the Methodist Church of New Zealand*, 1998). Their terms of engagement are instead documented in written "terms of call", an approach which simplifies legal compliance in relation to disputes where matters of faith and doctrine are concerned, as well as allowing a minister's normal work week to include public holidays (Burt, 2012). Denominations may in fact warn their constituent churches to deliberately steer clear of references to an employment situation, in order to

avoid confusion, blurred boundaries and vulnerability to legal action (Baptist Churches of New Zealand, 2014b, p. 183).

2.3 Changing Society

The spiritual conviction of a call often provides the lens through which ministers make sense of their pastoral experience, a kind of moral compass to guide them through the changing landscape of church and society (Carroll, 2006; Christopherson, 1994; Hogg, Adelman, & Blagg, 2010). Huge shifts in the culture of both church and society – pluralism, consumerism, and congregationalism, as well as clergy moral failure - bring many challenges to a minister's role and identity (Carroll, 2006; Ward, 2013). Changes like globalisation, diversity and technology mean that followers of Jesus no longer rely on their local minister for spiritual guidance and nurture; they can connect up with insight and interpretation through blogs, podcasts and TED talks (Ward, 2013). They want to participate in choosing the weekly music repertoire and they are likely to enjoy a beer with their weekly Bible study group. They may belong to more than one church at any one time, and possibly not contribute financially to either of them, preferring to support charities or opportunistic fundraisers.

Theological turmoil and declining membership and finances can make ministers “feel like captains of a sinking ship” and Carroll notes that a cottage industry has developed around clergy stress and burnout (Carroll, 2006, p. 164). Nevertheless, he notes, the temptation to quit in face of conflict and depression usually revolves around deciding to relocate to another ministry context rather than abandoning the notion of call itself (Burns et al., 2012; Carroll, 2006). Church ministers need to understand their context, know what ‘season’ of the organisational life cycle their church is, and recognise and interpret the larger picture in which the congregation is set. Their experience may well reflect the comment of eighteenth century clergyman and hymn writer John Newton who said that being a minister is at once “the worst of all jobs and the best of all callings” (cited in Carroll, 2006, p. 187).

Although there are many variations in understanding and praxis, in general terms the work of the ministry is to lead and manage an organisation comprised largely of volunteer workers, so it can speak ‘the truth of faith’ across a broad range of human experience (Rendle, 2002). Change management is a key competency; Ammerman and Farnsley (1997) report that pastors of congregations that failed to adapt to social change often lacked necessary leadership skills. Some were unable, and others unwilling, to “undertake the difficult, and often conflictual, work of dislodging old routines” (Ammerman & Farnsley, 1997, p. 327). At the same time they acknowledged that congregations behave in ways that make leadership - even of the most skilled pastors –

difficult (Carroll, 2006; Galindo, 2004). Ammerman observes that pastors have a key role to play as visionaries:

“What seems far more important than material resources for the survival of these voluntary organizations are the human resources that make it possible for change to be imagined and planned for. Someone has to see the connections between the congregation as it now exists and the congregation as it might someday exist. Someone has to imagine that it might remain spiritually and socially rewarding for its participants. Such human resources involve both the clergy and the laity, both those who provide leadership and those who must lend their energies to any effort for change. While lay leadership is important, pastors emerged . . . as critical players in the process of change”.

(Ammerman & Farnsley, 1997, p. 326).

Ammerman and others undertaking congregational research conclude that these men and women promoting and modelling the culture of their own organisation, as well as serving the needs of the wider community, are valuable human resources (Ammerman, 1993; Carroll, 2006; Rendle, 2002). As such they are worthy of interest to management studies, and in particular to the disciplines of Human Resource Management.

2.4 Managing Performance

Human Resource Management is a distinct function of an organisation, encompassing everything relating to the human beings in the group, and particularly concerns the choices made about organising work and managing people (Boxall & Purcell, 2011; DelCampo, 2011). The HRM field has a number of interconnected facets, including job analysis, recruitment and induction, performance management, learning, remuneration, labour relations and strategic HRM (Boxall & Purcell, 2011; Rudman, 2010). Managing staff and their performance is demonstrably significant for effective leadership and business viability, making the key dictum of strategic Human Resource Management that labour is a “resource to develop, not a cost to control” (Marlow, 2000, p. 140; see also Pulakos et al., 2012). Contemporary HRM is usually characterised as a bundle of processes, policies and practices that seek to achieve an organisation’s objectives by “strategically deploying committed and capable people using cultural, structural and personnel techniques in an integrated array” (Storey, 1995, p5, adapted by Macky, 2008). Within this bundle, performance management processes, often called PME or “Performance Management and Evaluation”, contribute to strategic advantage by managing issues such as workforce planning, evaluation and feedback, engagement and retention, development, discipline, health and safety, and employee wellbeing

(Macky, 2008; McKenna et al., 2011; Rudman, 2010). PME is intended to align employee actions with the organisational mission, vision and culture, to reward staff appropriately and develop their potential, and to ensure that a firm retains its 'human capital' through effective HR practices (Macky, 2008). When used as a strategic tool, PME can develop talent and minimise employee turnover, making optimum use of valuable human resources. In recent decades, changes in perception about effective leadership have led to the notion of high-performance (or in the UK, high-commitment) work systems; these are high-participation, low-coercion contexts where individuals are enabled to give of their best because they feel valued, involved and trusted (Boxall & Macky, 2009; Macky, 2008; McGregor & Smith, 1975; Pink, 2009).

Strategies for performance management can have a direct and measurable impact on a wide range of business results (McDonald & Smith, 1995; Pulakos et al., 2012), and most New Zealand firms have a formal performance review system (Macky, 2008). While there is considerable variety in the structures of performance management systems, the system usually encompasses mission and objectives, individual goals, regular reviews, training and practice, and remuneration and rewards (Alsop, 2013; Atkins, 2010). The traditional model of PME usually includes a formal (annual or semi-annual) appraisal process, in which an employee's performance, goals and objectives are evaluated by a management representative, with or without input from other employees, and feedback is given. The purpose of appraisal may be administrative (working conditions, rewards), developmental (coaching, training), and/or vertical integration (alignment with company goals), or a blend of these. The outcome may be a summative assessment, describing the past, or a formative evaluation intended to shape the future (DelCampo, 2011; Macky, 2008). It is one component of the overall performance management task of helping employees become efficient and effective (DelCampo, 2011; Rudman, 2010).

However appraisals are often the focus of concern and dissatisfaction for both managers and employees, and these difficulties lead to frequent changes in appraisal systems (DelCampo, 2011; Pulakos et al., 2012; Steinkellner et al., 2011). The word appraisal in itself implies a judgment being made, and the more neutral notion of 'review' is increasingly being used (Rudman, 2010). The two main approaches to reviews of worker performance depend on whether they use objective metrics, or subjective human feedback. When an 'input' model is used, the process considers role competencies, in terms of behaviour or personal traits (Berlinger, 2003). An 'output' model defines performance in terms of outcomes of worker effort; the well-known measure of KPI, or 'key performance indicator' is output-focussed (Sashkin, 1981). Critical to both approaches is the specification, in a clearly-documented job description, of 'Key Results

Areas' or broad outcomes for which the employee is responsible (Atkins, 2010; Rudman, 2010).

Performance review techniques fall into four main categories: comparison methods, standards-based reviews, results-based reviews and competency-based assessments (Latham, Almost, Mann, & Moore, 2005; Steinkellner et al., 2011). All of these, as well as the more recently-developed '360' review, may be subject to errors; subjective judgments can be influenced by the disposition of reviewers, though the multiple-voice review can provide more accurate assessment (Lepsinger & Lucia, 1997; Taylor & Bright, 2011). Issues of human error and subjectivity may include leniency, harshness, prejudice, first impressions, halo/devil effects and central tendency (rating most as average), as well as office politics and working from inadequate or incorrect information (DelCampo, 2011; McKenna et al., 2011; Rudman, 2010). The deficit focus adopted by managers conducting traditional appraisals can sap energy, reduce commitment and even lead to decreased performance (Culbertson, Henning, & Payne, 2013; Forte, 2014; Latham et al., 2005). Other distorting factors such as poor reviewer training, obsolete measures and rapidly changing job requirements have also given rise to dissatisfaction and disillusionment (Culbert, 2010; Pulakos et al., 2012). HR managers are increasingly sceptical about their own systems' effectiveness, and the whole notion of performance appraisal itself is coming under attack (Culbert, 2010; McKenna et al., 2011; Steinkellner et al., 2011).

Performance Management is now referred to as the "Achille's heel" of HRM (Pulakos et al., 2012, p. 1); managers and employees view it as ineffective, and doubt its ability to deliver improved performance (Globoforce, 2013; Levy & Williams, 2004; Pulakos et al., 2012). Practitioners acknowledge evaluation is needed, for administrative reasons, but agree it is changing focus from a top down 'judging' role to a more participative feedback culture (Levy & Williams, 2004; Pulakos et al., 2012). Many HR processes already include a continuous feedback cycle so there are 'no surprises' when the formal reviews are undertaken. Managers need to be responsive to employee concerns and provide opportunities for immediate on-the-job learning, rather than waiting until review season to address performance issues (Latham et al., 2005). The goals of HRM include a number of constructive individual and organisational factors, including decisions about remuneration and rewards, but removing systemic barriers to employee performance is also a key management function.

Appraisal as a management tool is said to assign an inordinate amount of responsibility for poor performance to the individual employee (G. E. Roberts, 2003). In Boxall and Purcell's "AMO" taxonomy or performance equation, job performance is influenced not only by 'ability' and 'motivation' but also by environmental and cultural factors affecting

'opportunity' (Boxall & Purcell, 2011). Responsiveness to the need for removing such barriers can create a more productive environment, and may avoid discipline procedures for failure or mediocrity that is not actually within the employee's purview (Luecke, 2006). A common barrier, according to HR officers in New Zealand, is the "vague performance objectives" set by their managers (Macky, 2008, p. 264); unless the employee clearly knows what they are meant to do and what it will look like if they do it, they cannot contribute effectively to an organisation's goals (R. Gray, 2004; Steinkellner et al., 2011).

Social change is another factor that affects performance. In turbulent business environments, flexibility and innovation are critical for success (Steinkellner et al., 2011). Effective HRM can generate human capital advantage by recruiting and retaining exceptional human talent, in valuable and scarce resources that cannot be easily imitated (Barney, 1991; Boxall & Purcell, 2011). This 'Resource-Based' view of HRM requires more subtle performance management processes and measures than the mechanistic tools of Likert scales and KPI's which were developed for a Command-and-Control environment (Barney, 1991; Boxall & Purcell, 2011; Hudson, 2004). The traditional approaches are said to focus too much on past performance, and correcting deficits, failures and weaknesses, while the alternative forward-looking approach of 'development-focussed coaching' is a more relevant and effective way to develop and engage valuable human talent (Steinkellner et al., 2011). Many studies show the positive impact of participatory approaches on organisational outcomes (Lepak & Snell, 2002; G. E. Roberts, 2003; Steinkellner et al., 2011). Latham *et al*/noted in 2005 that "Performance appraisal that leads to ongoing coaching ensures a highly trained highly motivated workforce" (2005, p. 85), while a more recent article about changing workplaces, from talent management firm PDRI, notes that setting relevant expectations and near-term goals through continuous feedback will more effectively enable qualified, knowledgeable, dedicated employees to succeed (Pulakos et al., 2012). In the book "Get Rid of the Performance Review!" Samuel Culbert, a management professor at UCLA, advocates using alternative strategies to reduce intimidation and focus on the future; he recommends moving from a review to a "two-sided reciprocally-accountable performance preview" (Culbert, 2010, p. 146). The designers of another alternative, development-focussed coaching, describe it as moving from the "prison of 'either/or'" intrinsic to conventional appraisals, to the 'both/and' possibilities of dialogue and on-the-job development (Steinkellner et al., 2011, p. 16). These changes reflect the need to adapt traditional performance systems to fit changing contexts of work and management.

2.5 The Social Sector

A church is an organisation, and since it deploys humans (staff and volunteers) to accomplish its aims, HRM processes, and specifically PME, have application to its

effective function. In business studies, it is perhaps best viewed as a special case of a Not For Profit (NFP), or 'social sector' organisation. These organisations operate for social or community purposes, do not distribute profits to owners, and are self-governing (Wells, 2012; Yap & Ferreira, 2010). The NFP sector in New Zealand brings in \$9.8 billion, 5% of GDP, of which about half represents work done by volunteers who receive no direct remuneration (Birchfield, 2012; Sanders, O'Brien, Tennant, Sokolowski, & Salamon, 2008). However funding and financial issues are key concerns for non-profit organisations around the world, and this impacts their capacity to recruit and retain valuable human talent (Birchfield, 2012; Sanders, O'Brien, Tennant, Sokolowski, & Salamon, 2008). While most corporate reward systems revolve around extrinsic rewards such as pay rises, promotions and prizes, NFP tend to rely more on intrinsic motivations such as autonomy, appreciation and a sense of accomplishment (Luecke, 2006; Speckbacher, 2003; Yap & Ferreira, 2010). Nevertheless, robust systems to ensure accountability to the overall mission, and to donors and supporters, are vital. "The most important feature of any organisation is the quality of its human resourcesleadership alone is not sufficient to address all the problems facing the sector" (Kamaria & Lewis, 2009, p. 307).

The evaluation and development of personnel in NFPs is complicated by the multiple and sometimes competing nature of their organisational objectives, and performance measurement systems in the sector are not well researched or understood (Yap & Ferreira, 2010). Review and reward systems are used, but complicated by the interests of multiple stakeholders whose goals and needs are heterogeneous (Speckbacher, 2003; Yap & Ferreira, 2010). In the case of a church, these include members, staff, attenders, volunteers, donors, outreach recipients, community beneficiaries of services, and in most cases a national denominational body (Lichtenwalner, 2012). Kaplan's strategic management tool, the 'balanced scorecard', has been adapted for NFP organisations by shifting the hierarchy to reflect the valuing of mission and customers over financial success (Collins, 2005; Kaplan, 2010; Yap & Ferreira, 2010). This would apply to churches as well, but a charity or a church cannot serve its purpose without resourcing, and, over the long term, organisations that cannot balance the books are not viable (E. Gibbs & Coffey, 2001; Roxborough, 2005b; Wells, 2012). The financial bottom line is an obvious indicator, but in people-based organisations a decline in attendance or volunteering can also signal "terminal disease" (Jones, 2010, p. 14).

2.6 Managing Clergy

Organisations need structure and accountability, and leaders must be good stewards of human and financial resources (J. Gray & Tucker, 1986). The wisdom of the business world is now accessible to churches through an extensive literature, a universal

language, and writers who package their material in Biblical idiom (Roxborough, 2005a). A reader comment to a Christian leadership journal notes that *“Smart leadership is smart leadership, whether you find it in Luke’s gospel or at General Electric...Leadership is helping people capture a vision and follow it successfully.... being wise about what we do and how we do it.”* (Reed, 2006, comments section). The Christian faith has offered leadership wisdom to the corporate sector as well; Jesus was the original ‘servant leader’ and the Christian faith has always valued humility above hubris (Collins, 2001; Greenleaf, 1991).

The appropriateness of applying established business principles to church management is, however, subject to debate. On the one hand, respected management writers such as Drucker, Handy, Greenleaf and Collins are Christians who explicitly apply their business principles to leadership in faith communities (Roxborough, 2005a). High-profile US pastors like Hybels and Stanley attribute their churches’ success to the application of organisational psychology and business principles (Hybels, 2011; Reed, 2006; Stanley, 2012). But other pastors, such as John Piper (2003), critique the business worldview, and decry the use of corporate metaphors for pastoral ministry. In the New Zealand Baptist, a Christian philosopher warned of dangers in the business model, which he said is blind to many of the church’s tasks - spiritual growth, nurture of people, and modelling community (Hofmans-Sheard, 2002, in Baptist Research and Historical Society, 2014, p. 2567). Management guru Jim Collins acknowledges that church leadership is different, and in some ways harder. He says “Level 5 leadership looks different in a non-business setting. A church (*may have*) multiple sources of power, constituencies in the community, constituencies in the congregation... church leaders have to be adept in a more communal process” (Reed, 2006, p. 1). The pros and cons are expressed well by Roxborough, a New Zealand authority on Presbyterian leadership:

“Management culture is geared for success in face of competition and the essential metrics of that success are financial.... can a system designed to that end also serve the needs of the Christian church operating with different values and with a different "bottom line"?.. I think it can, the benefits are considerable, and failure to move in this direction is not only ignoring something helpful to hand, it prevents us from engaging with a common language that globalisation has made nigh universal and with which members of our congregations in the workforce will be well familiar. If we do not speak this language we can’t criticise it either and that is also needed.... there is much which can be 'baptised' into Christian service, provided Christian values are named.”

(Roxborough, 2005a, p. 9).

The discourse of “church as business” is found in the HRM sector as well, although there is a dearth of quality research; some studies of churches and ministers use an organisational behaviour lens, but few explore factors relating to performance management (Lawson, 2009; Moon, 2013; Nichol, 2011; Peyton & Gatrell, 2013; Pratt, 2011). Performance review in particular is not well understood, or practised by the church (Hudson, 2004; Messina, 2007; Zech, 2010). Like NFPs, churches use the workforce quite differently from public organisations or market-oriented corporations, and need to find creative ways of rewarding a committed workforce (Haski-Leventhal, 2012; Jabbour & Santos, 2009). Skilled HRM capacity with both staff and volunteers is needed to keep a faith community in a state of readiness for change (Birchfield, 2012). An Australian HR Manager for the Catholic church notes that in face of poor managerial skills, and insufficient training and support for leaders, her department needs to act as the church’s conscience, safeguarding relationality, affirmation, consistency and compliance with government and denominational legislation (Messina, 2007). Churches are not motivated as much by money, prestige or power as commercial organisations, but gather around concerns for the dignity of human beings, the needs of the poor, and the good of society; these values will impact HR processes including Performance Management, which Messina calls ‘stewardship’ of the church’s precious human resources (Messina, 2007, p. 35; see also Zech, 2010). A spirituality of church ministry work necessarily encompasses an understanding of call, the voice of God connecting deep gladness and the world’s deep hunger (Buechner, 1993; Messina, 2007). A sense of being called is not exclusive to clergy, but the notion of vocation is of particular significance to priests and pastors. Contingent practices of performance management in the church need to acknowledge that at the deepest level the person is working for God, and for God’s gathered people, and in that sense accountability has a very different flavour that it does in the corporate sector. Some of the most important values of the church, including the mystery of faith itself, are difficult to measure (Roxborough, 2005a; Zech, 2010). Nevertheless, the realistic hope is that churches, like high commitment workplaces, are contexts where individuals are enabled to give of their best because they feel valued, involved and trusted. Chapter Three describes the research design for the 2015 Clergy Review study, which explored how formal review is experienced in the working lives of 15 New Zealand ministers by following a qualitative paradigm and applying Grounded Theory methodology.

3. Research Design

- *This chapter introduces the genesis of a specific research question for a qualitative study of ministers' experience of performance review, and the decisions involved in designing the 2015 research project in Baptist and Presbyterian churches in New Zealand.*
- *It explores the philosophical background and research paradigms that led to the choice of Grounded Theory methodology, and introduces the key features of this inductive approach to qualitative research. Ethical challenges considered, including the dynamics of the researcher-researched relationship, will also be described*
- *It will show how Grounded Theory methodology shaped the sampling protocols used, the methods applied, and the deferral of consideration of relevant literature until after data analysis. The Theory Building stage of the methodology produced five constructs distilled from the data to answer the research question.*

3.1 Research Area

Qualitative study of church ministers' performance is a significant gap in management research, and a surprising one considering how sole-charge clergy rely on outsiders to validate their practice, identify professional development needs and act as advocates in areas of health, safety and justice (Messina, 2007; Peyton & Gatrell, 2013; Zech, 2010). Clergy evaluation strategies may have both common features with, and significant differences from, mainstream HRM research, because the ethos and goals of a church are so different from those of a commercially-driven organisation or even others in the third sector (Messina, 2007; Speckbacher, 2003). Ministers may not be employees in the technical sense (*Mabon v Conference of the Methodist Church of New Zealand*, 1998), but they are valuable human resources who work relatively unsupervised in organisations that contribute social capital to the community, in the form of spiritual training, ethical values and service of others (Rendle, 2002). Their vocation is to 'serve God' rather than a human manager (Peyton & Gatrell, 2013) but they nevertheless do have local and denominational authorities to whom they are accountable, and who are concerned to evaluate and manage the performance of their clergy workers (Hudson, 1992; Zech, 2010).

This thesis explores the practice of Performance Review in two New Zealand churches, which arose through my observations that formal evaluation is experienced in different ways in the working lives of ministers (Chase, 2008; Nichol, 2011; P. White, 2009). McKenna, Singh, and Richardson state that "Performance Appraisal takes place in complex and often mysterious ways," (2008, p. 127) and Clergy Review, a facet of the Not for Profit sector, promised to be an engaging context for interpretive research. I was curious about claims that current research in Human Resources Management is under-theorised and over-reliant on hegemonic prescriptions for best practice, and hoped to develop a more robust theoretical framework or at least a contribution to disciplinary utility (Fleetwood & Hesketh, 2006). By listening to voices other than the dominant discourses of management, I hoped to learn about the 'How' of responses to Clergy Review, but also the 'Why' and the 'So What?' of implications for future practice. Taking

a business sector perspective might offer useful information for churches about protecting and developing the considerable investments made in parish clergy, as well as providing a helpful addition to the Performance Management literature.

A useful tool in the designing of a people-centred research design was Plowright's (2011) three-dimensional grid, based on combining the Quantitative/Qualitative distinction (which he characterises rather simplistically as collecting numbers/narratives) with two recognised data source management typologies:

1. Observation, Asking Questions, Artefact Analysis (Hammersley, 1981)
2. Field Experiment, Case Study, Survey (Gomm, Hammersley, & Foster, 2000).

The Plowright model offers an eighteen cell grid, representing different research strategies, which I populated with possibilities for obtaining data that should reveal answers to my research queries. Reflecting on these in light of my background of counselling, and consequent preference for a storytelling approach over statistical analysis, enabled me discern that the most helpful and pragmatic means of data source management was the cell representing **"Qualitative-Asking Questions-Case Study."** (Plowright, 2011, p. 19). For a qualitative approach, I could collect rich narrative data by interviewing a small number of ministers in depth about their experience of clergy review. This is the paradigm of interpretivism, exploring diverse human experiences of reality by an "inductive process of identifying patterns" (Creswell, 2009).

My formulation of a specific research question was iterative, with three discernible stages. I began by simply articulating my interest in how churches do their clergy reviews and how we can make them better. However, this comparative vision would likely commit me to something quantitative, when I already felt more drawn in the qualitative direction. Secondly, when I came across a research question which used the expression "salient factors" (Plowright, 2011, p. 18). I formed a question around this adjective and added a focus on the established business practice of Performance Review. The final iteration of the research question became:

How is Performance Management and Evaluation understood in churches and what are the salient features of ministers' experience of clergy reviews?

This iteration reflected my preference for qualitative research, grounded in a curiosity about human behaviour, and complied with White's three criteria for a robust research question – brevity, clarity and precision (P. White, 2009, pp. 1, 7). I wanted to investigate and describe the "socially and ideally real" of ministers' experiences of evaluation

(Fleetwood, 2005). An interpretivist paradigm best suited my own philosophy and the scope of this project; Burrell and Morgan note that interpretivists subscribe to different ontological perspectives, saying:

“The paradigm embraces a wide range of social thought but shares in common the desire to understand and explain the social world from the viewpoint of the actors.”
(Burrell and Morgan, 1979, p 227, in McKenna et al., 2008, p. 121)

The interpretivist paradigm seeks to access the experience and thinking of social beings by engaging scrutiny, subjectivity and an agency view of people (McKenna et al., 2008).

I planned a project exploring the experience of clergy review with ten to fifteen ministers, prefaced by an examination of denominational policies to scope the landscape. With such a small sample, I could hardly claim wide generalisability (6 & Bellamy, 2012; Crotty, 1998). Specific numbers from multiple perspectives could, however, contribute to a rich tapestry or bricolage of description (Denzin & Lincoln, 2008), to help readers understand how review was experienced in the working life of a minister. Creswell (2009) notes that in qualitative social research, theory can offer broad explanations for behaviour and attitudes, provide theoretical lenses that guide researchers about what is important, or become the endpoint of a inductive process of identifying patterns. This last appealed most for my projected research into clergy review:

“The researcher begins by gathering detailed information from participants and then forms this information into categories or themes. These themes are developed into broad patterns, theories or generalisations that are then compared with personal experiences or with existing literature on the topic.”
(Creswell, 2009, p. 64).

3.2 Philosophical Stance and Theoretical Assumptions

The way we think the world is, and what kind of beings humans are - ontology - influences what we count as knowledge – epistemology. Ontology also impacts how we think reality can be investigated, in the methodology and techniques we choose for research, as well as the kinds of theories we construct. All these then feed into the political positions we are prepared to take (Fleetwood, 2005). Most research in the discipline of Human Resource Management comes from a positivist ontological paradigm, the view that objective truth can be revealed through quantitative methods that utilise linear thinking and statistical tests to reveal cause-effect relationships (B. M. Grant & Giddings, 2002; Qu & Dumay, 2011). This scientific emphasis is traceable, at least in the USA, to the emergence of HRM as a field of scientific inquiry alongside scientific management, industrial psychology and concerns for the welfare of workers (McKenna et al., 2008). Positivist approaches emphasise objectivity, systematic observation, detailed facts and testing of hypotheses (B. M. Grant & Giddings, 2002).

Social science research today is shifting from an objectivist worldview to a socially-constructed one (Fleetwood & Hesketh, 2010; McKenna et al., 2008). These paradigms take the view that the truth of a situation can also be found in subjective and communal knowledge such as participants' understanding of themselves (B. M. Grant & Giddings, 2002). Although a certain ontology entails a particular epistemology, which in turn points to an apposite methodology, in practice we often live and research within contradictions which create "confusions and blurry boundaries that make life difficult" for the researcher (B. M. Grant & Giddings, 2002, p. 12).

My own Critical Realist ontology stands in a middle ground between the clear evidence claims of realism and the more opaque milieu of social construction (Fleetwood & Hesketh, 2006; Olsen, 2009). Critical Realists acknowledge a real world but accept that perceptions and explanations are always subjective and mediated by an "existing stock of conceptual resources" (Fleetwood, 2005, p. 199). Olsen (2009) offers a useful example from research in the third world; definitions of poverty vary widely and testify to some social construction in its meaning, but no one would say that poverty does not exist in some real form. The same rubric could well apply to faith. The assertion of critical realism is that there is an objective reality that exists independent of our ability to experience it, a deep underlying structure that can be known, though never in a final way (Thatcher, 1999, p. 23).

This perspective overlaps with Michael Polanyi's philosophy of personal knowledge, which pays attention to the personal involvement of the knower in all understanding (Nye, 2002). In the 1930's, Polanyi observed how knowledge is transmitted by individuals and traditions, and is always viewed through some subjective lens; his 1958 book "Personal Knowledge" described the dichotomy between supposedly-objective 'facts' and purportedly-subjective 'beliefs' as misguided (Strom, 2014). He believed all knowing is founded on some degree of faith; science was a means of discovering a hidden reality, mediated by the skills and commitment of the scientist (Nye, 2002). For Polanyi, realist epistemologies, which hold that the only valid knowledge is that which can be measured and tested, are naïve (Strom, 2014). Instead knowing is a kind of indwelling; some important knowledge, like knowing how to swim, is tacit, mysterious, beyond description. Yet such truths are useful, and even critical for survival. Polanyi's philosophy has great appeal to theologians, Thomas Torrance (1998) being a prime example, and helps bridge the gap between untenable positivist claims of objectivity, and the relinquishing of all truth which is the way of postmodernity.

In adopting a critical realist approach, I consciously rejected postmodern paradigms such as those used in critical studies, because I find a version of reality that relies wholly on

social construction to be emaciated (Fleetwood & Hesketh, 2006). The notion of discourse is useful for describing human acts of differentiating, classifying and naming, and I note that some post-structural researchers find common ground with aspects of realism (O'Doherty & Willmott, 2001). An interpretivist paradigm, where an iterative hermeneutic process is used to explore people's experiences, and the meanings made of them, is coherent with this epistemology (McKenna et al., 2008; Olsen, 2009; Yeung, 1997). I assume that spiritual realities are a part of our multiple perspectives of construction, and that notions of God can be part of the conversation, because regardless of God's ontological reality, the idea of God can certainly influence human behaviour (Maxwell & Mittapalli, 2007).

3.3 My Research Background

My first experience of academic research, at Otago University in 1972, was a study of motivation among Presbyterian and Catholic seminarians, utilising a psychometric tool (McLeay, 1972). I took a naively empirical approach, and was surprised when one of my hypotheses was statistically significant in the opposite direction from that predicted by a literature review. I would have liked to understand why, but being a student of both science and theology, I was content to have uncovered the "truth" of the matter; I was, on reflection, a positivist researcher.

Forty years of preaching Christian sermons has given me extensive experience of hermeneutics, 'interviewing texts' to find patterns that make sense (Fee & Stuart, 2014). I saw my assumptions tested and my pet doctrines challenged, and I realised how history and culture can shape our own truth (Torrance, 1998). In 2001 I undertook postgraduate theological research that required deeper interrogation of texts and people; one project involved a qualitative methodology which I now identify as interpretivist (Coleman, 2003). I was looking for patterns, and hoping to find ways we could do things better in our church.

Assignments at AUT Business School included exploring organisations where I have learned to identify patterns of discourse. One of these involved a 'political' stance on gender equality in the clergy (Coleman, 2011). I have seen my approach to research changing, away from the 'one truth' of conservative Christianity to a more nuanced view where culture and experience produce different, sometimes competing, discourses. I realise that my position on biblical interpretation is imbued with an awareness of social construction, the view that humans construct our reality through language, and generate meaning together (Branson, 2004; Strom, 2014).

This research was informed by my professional background as a trained minister, with pastoral roles in the two denominations (Presbyterian and Baptist) from which participants were recruited. I also had experience of conducting interviews in tertiary

research projects, in assessment of ministry candidates, and recruitment for national church roles, as well as class research projects undertaken in postgraduate studies at AUT. My current role as a clergy supervisor requires skills in active listening and maintaining boundaries. This experience, combined with values of my Christian faith such as justice and forgiveness, meant I brought to this study a strong commitment to supporting ministers and churches in mutual development and effective change leadership.

A positionality statement is offered as a sidebar.

3.4 Researcher-Researched Relationship

Interpretive researchers bring their own experience, values and commitment to their work, and need to acknowledge that subjectivity, and subject it to scrutiny (B. M. Grant & Giddings, 2002). As a minister-researcher, I am aware that I bring 'insider' experience of helpful, painful and non-existent reviews, and of peer group discussions about the cognitive, emotional and behavioural consequences of appraisals. I have seen reviews used as a firing mechanism, a display of power, or a conduit for blame, and observed clergy drop out, burn out or exhibit moral failure where a timely constructive appraisal might have changed the turn of events. I believe reviews can be a means of expressing appreciation for the gifts and call being exercised, and for sharing expectations and setting goals, and I am frustrated when they are co-opted by formal business criteria or the self-promotion of ethnic hierarchies. Although my intention was to hear the work stories of the participants, I was aware that my own stories and those of my colleagues would also be in the room with us. Reflexivity acknowledges that interview data cannot be simply lifted out of the contexts in which they were gathered and claimed as objective; the role of the researcher's values and beliefs in co-constructing the findings needs to be recognised (Alvesson, 2003; Qu & Dumay, 2011).

In fact, in planning the project, I counted on the fact that the social context of New Zealand Christian churches is well known to me, and that Christian jargon, acronyms and turns of phrase used by participants would require little explanation. While many participants would be Pakeha New Zealanders trained at NZ universities and seminaries, I hoped to also hear from Maori or NZ-born Samoan ministers, cultural contexts of which I also had a reasonable grasp. The fact that at the time of the interviews I myself was a parish minister, (an insider) who undergoes reviews, could build a collegial partnership with participants, but consideration also needed to be given to the possibility of a power imbalance arising from the researcher role (Fontana & Frey, 2008). My (outsider) position as a postgraduate researcher could impute knowledge- and status-power they may find intimidating (B. M. Grant & Giddings, 2002). As a member of the New Zealand

Association of Counsellors, I was subject to its Code of Ethics which ensured that values

Figure 1: Researcher Positionality Statement 2015

Identity: *I was born in provincial New Zealand 64 years ago, the first of five children of a Presbyterian minister father and teacher mother. Our family has strong ties with Scotland but I am a proud New Zealander. In adult life, I learned the history and meaning of the Treaty of Waitangi, and take seriously the notion of partnership with Maori as tangata whenua. My awareness of cultural perspectives, combined with an understanding of Christian history and denominational differences, means I understand the notion of discourse and how people come to view the world through a particular lens. Over the last ten years I have become interested in what a Christian group like a church can learn from other organisations such as businesses or charities. Post-graduate study is helping me learn how to apply a business studies lens to the dynamics of churches, congregations and pastoral leaders.*

Gender: *I am the oldest of three sisters and two brothers, from a family that embodied a mixture of gender affirmation and gender prejudice. This experience and others, like exposure to feminist discourse, have developed in me a strong sense of justice. I devote time and energy to mentoring women theological students and sponsor a female seminarian in the Palestinian Territories.*

Church: *I am a Christian by heritage and by choice. I was baptised into the Presbyterian Church and raised in the faith till I was old enough to follow Christ myself. I made that choice at age 14, and 46 years later I am still a committed follower of the Risen Christ. I regard my relationship with God as core to my identity and have served his church in many regional and national roles.*

Vocation: *I exhibited leadership gifts at school and served as Head Girl. In my late teens I had an epiphany experience of a "call to ordained ministry", which eventually led me to theological studies. This was not from a desire to follow in my father's footsteps; there were no women minister role models and I hadn't enjoyed growing up in the Manse. My parents were cautious and some Christians opposed my vocation, but in 1974 I became one of the first women Presbyterian ministers in New Zealand.*

Academic: *My first degree was in the Sciences and grounded me in scientific method, empirical thinking and the use of logic and reason. My second degree and later Masters studies were in theology, providing a different perspective on truth, and resonating with my faith heritage and commitment. My working life has included teaching in a variety of forms, and I have a passion for lifelong learning. I have served the Presbyterian Church for 40 years in chaplaincy, rural and suburban parishes, and local, regional and national workgroups. More recently I was seconded to a Baptist church where for six years I served in local and regional leadership roles.*

Family: *I married Dr Ric Coleman 42 years ago. Our intention to have an egalitarian partnership was constrained by geography and culture; for many years I took the "at home" role of wife and mother, raising four children and contributing voluntary leadership in our small town. In 1994 the family relocated to a large city, in response to my long-held desire to work in my profession. We both worked fulltime for fifteen years as our children undertook tertiary education, courtship and marriage. Now we have seven grandchildren and I work part-time to enable me to help with childcare.*

Counselling: *While raising the children, I undertook postgraduate studies in counselling and became a volunteer community counsellor and part-time school guidance counsellor. When active in parish ministry again, I applied my counselling knowledge and skills to many aspects of the role; I trained as a clergy supervisor and still counsel ministers today in my small coaching business. I have been a member of the New Zealand Association of Counsellors for the last 25 years and am currently a registered pastoral supervisor.*

of respect and reciprocity would undergird the project (New Zealand Association of Counsellors, 2012). As a committed participant-observer I planned to use 'clean language questions' that avoid presuppositions and open up responses, along with reflexivity, the ability to 'bend back' on one's attitudes and actions and monitor issues of values and power (Chase, 2008; Tompkins & Lawley, 1997).

In inductive research, "an open mind is not an empty head" (Dey, 1993, p. 229); though I took a nondirective stance, my approach to the interviews was not theory-neutral (Hammersley, 2013). As well as constructs familiar to Human Resources managers – the resource-based view, the human resource architecture, and formative/summative review styles – there were typologies from my pastoral supervision training, from change management lectures, and from family systems theory, that were all potential "sensitising concepts" which might influence my questioning stance (Charmaz, 2014, p. 30). In relating data and theory to pastoral ministry, I could not ignore Biblical assumptions about call and gifts, mission and ministry, stewardship and

accountability (I. Guy, 2008; Messina, 2007). There would also be the competing

discourses of the participants' denominations, of which I hoped to gain a deeper appreciation through the project. However I was utterly committed to genuine listening, inductive theorising and open sharing of findings in a participatory approach to the research project (B. M. Grant & Giddings, 2002; Mack, Woodsong, Macqueen, Guest, & Namey, 2005).

3.5 Ethics

The research project entailed addressing issues of ethical values, and making specific provision for minimising harm, respecting autonomy, and protecting privacy (Plowright, 2011). Ethical principles are often ambiguous, sometimes paradoxical, and are always subject to interpretation by the researcher or their institution (Hammersley & Traianou, 2012). Auckland University of Technology's robust ethics consent process requires projects to be scrutinised closely for any danger to the privacy or safety of participants, researchers, or the institution (Auckland University of Technology Ethics Committee, 2014). I gave serious thought to potential ethical challenges, providing answers to specific queries, including reference to the Treaty of Waitangi's three principles of Partnership, Participation and Protection. Both the NZ Baptist churches and the Presbyterian Church of Aotearoa New Zealand have intentional bicultural policies and practices (Baptist Union of New Zealand, 2014; Presbyterian Church of Aotearoa New Zealand, 2014a, 2014b). As a minister in full standing of both these denominations I was aware of, and committed to, these principles. My membership in the New Zealand Association of Counsellors also entails commitment to Treaty partnership (Crocket, 2013). Although I was not sure if any participants would be Maori themselves, I believe all New Zealanders are entitled to these benefits of Treaty partnership. Participation was voluntary and ministers could withdraw during the interview if they wished, as well as request that certain details be removed. The time and location of the interviews was determined by the participant, and I undertook to provide a summary of the findings with them at the end of the research project.

Documentation of the careful processes applied to recruitment of participants, and to the provision of clear information about the research project, its purposes and its protocols, is included in the Appendices. All participants signed an AUT consent form and agreed that I could use their accounts of experiencing ministry review. No significant conflicts of interest were identified, as the recruitment protocol excluded family and workplace colleagues. Consideration was given to emotional safety, and provision made for referral to the ministers supervisor; in the event this was not needed. Ethics principles also guided the assurance of anonymity which guaranteed that from transcription onwards, confidentiality would apply and pseudonyms would be used, and where possible other identifying details would be removed. Before the interviews began pseudonyms were

generated for each person; I used Hebrews boys' and girls' names, generated from a baby name website. These were randomised and allocated to participants in order of the date of interview and their gender. Data security during and after the research period was also addressed, and included the possible publication of the findings after the Master's Thesis was submitted. Ethics permission was granted in November 2014, and data collection was undertaken between January and April of 2015.

3.6 Methodology and Methods

3.6.1 *Choosing a Methodology*

Methodology is the process of converting a Research Question into a Research Design by thinking about how it might be answered, making decisions about the kinds of data needed and choosing appropriate methods to enable links to be made between questions and conclusions (Plowright, 2011; M. M. White, 2009). Philosophical paradigms play a part, but it is the question itself that determines the appropriate research architecture, strategy and tactics (Sackett & Wennberg, 1997; Stone, 2002). Because I wanted to discover how evaluation is experienced in the working life of ministers (Chase, 2008; Greene & Robbins, 2015; Nichol, 2011; Peyton & Gatrell, 2013), I planned a preliminary exercise of considering available denominational HRM policies. Then in the 'project proper' I would interview a group of ministers, looking at the "ideal" and "social" realities of their experiences of review (Fleetwood, 2005, p. 199). The analysis would be an iterative hermeneutic process that could contribute relevance and trustworthiness to readers (Bryman & Bell, 2011; Creswell, 2009; B. M. Grant & Giddings, 2002).

In determining how to most effectively hear and interpret the multiple voices in the data I planned to collect, I sought an appropriate methodology, what Giddings and Grant call a "thinking tool" (Giddings & Grant, 2007, p. 7). I considered Interpretive Description which is utilised in many postgraduate projects in the Health Sciences in New Zealand. ID is a relatively new qualitative methodology, aimed at generating clinical knowledge relevant for the evidence-based milieu of the health disciplines, and is both accessible and coherent (Thorne, 2008; Thorne, Kirkham, & MacDonald-Emes, 1997). However I decided it did not hold as much promise for the interpretive dimension of the project as I had in mind; although ID has an interpretive orientation, it is not intended to yield new theory or enable higher order abstraction (Hunt, 2009). I could also see how an application of Discourse Analysis might be revealing, but I was not committed to the Foucaultian constructivism that approach entails (Olsen, 2009).

By contrast, the interpretive approach of Grounded Theory Methodology seemed more compatible with my critical realist philosophy (Charmaz, 1990; Yeung, 1997 and Kitchen,

personal communication, 2014). Grounded Theory began as a positivist methodology but 1990's scholars leapt across an "ontological and epistemological gulf" to use it in a more constructivist mode (Charmaz, 2014, p. 12). Grounded Theory methods suit research contexts where there is limited existing theory (such as HRM in churches). I decided the systematic yet flexible guidelines for collecting and analysing data would enable me as a qualitative researcher to construct theory from the data itself by separating, sorting, and synthesising in a constellation of methods (Charmaz, 2014).

These include:

- Intensive interviews using minimal questions: In a naturalistic context similar to the invitational conversations of narrative enquiry, I could explore opinions, emotions, intentions, and actions, in the interviewee's own voice, at times incorporating notions from other participants (Charmaz, 2014; Chase, 2008). Interviews would be recorded as digital audio, field notes and transcripts.
- Coding/analysis of narrative data: In a Grounded Theory approach, analysis is performed concurrently with data collection and would be particularly aimed at identifying "sensitising concepts", or tentative theoretical ideas to pursue in the emergent research design (Charmaz, 2014).
- Memo-writing, concurrent with both interview and analysis: the regular, private writing of freeform articles would enable me to build a memo bank of intellectual capital (Glaser, 2013a), as well as engaging in reflexive consideration of my researcher role (Charmaz, 2014).
- Theoretical sampling: I also hoped to test out emerging themes and categories during data collection, a procedure that is used in Grounded Theory Methodology to triangulate data, and thus explicate and validate theoretical codes (Charmaz, 2014; Woodside & Wilson, 2003).
- Theory Building and report writing: all data, codes, categories, and memos would be integrated with artefactual material (e.g. academic literature, organisational policies) in the key activity of Grounded Theory methodology. I was heartened by Charmaz' suggestion that while explicit theory construction may not always result, provision of "a useful analytic framework makes a significant contribution" (2014, p. xv).

Ministers are used to engaging in hermeneutics, but not usually in a research project in Business Studies. I looked forward to employing my understanding, experience and skill in an interpretive project researching an extensively-described HR practice – that of Performance Review – in the less well-known terrain of my own professional context of church ministry. I hoped to explore the ways performance and evaluation strategies, particularly in the annual or triennial clergy review, both reflect, and differ from, the findings of the ubiquitous positivist research of the HRM field. Because I admire theory

that can “burrow deeply in to microprocesses, laterally into neighbouring concepts or in an upward direction into broader social phenomena... (and) explain, predict and delight” (Sutton & Staw, 1995, p. 378), I hoped to reveal both broad explanations and guiding lenses for future research (Creswell, 2009). Where quantitative methodologies look for facts, structures and predictability, my qualitative approach would “listen to other voices” and help churches to “be better informed of the implications of their actions” (McKenna et al., 2008, p. 13). I planned to apply Grounded Theory methodology to source rich data, engage in robust description, and hopefully build a useful theoretical framework for understanding and using Clergy Review.

3.6.2 Grounded Theory Methodology

GTM is a revolutionary approach to qualitative research that emerged in the 1960's out of the work of sociologists Glaser and Strauss (1967/2008) who talked to terminal patients and their caregivers (M. A. Grant, 2010; Walker & Myrick, 2006). Coming from a scientific background, but wishing to mine the depths of a rich interpretive tradition, they felt classic sociological theories were too limiting for new areas of social life that needed exploration (Glaser, 2008; Urquhart, 2013). They combined rigor and creativity in intensive field interviews, diligent note-taking, and analytical discussions, and generated a new methodology that “enabled the researcher to generate systematically a substantive theory grounded in empirical data” (Walker & Myrick, 2006, p. 548). Taking what Glaser called quantitative ‘slices of data’ they constructed analytical categories that became components of an emerging theory - a plausible relationship between concepts (Eisenhardt & Graebner, 2007; Sutton & Staw, 1995; Urquhart, 2013). The iterative to-ing and fro-ing between data, and what the researcher is naming and renaming it, helps clarify the abstract principles behind the research conversations (Charmaz, 2014; Urquhart, 2013). The theory resulting from this “abstracting upwards” can be reported in a narrative framework, a set of propositions, or in many cases a matrix or graphic (Urquhart, 2013).

The key to GTM is emergence of the theory, though in later years the two researchers parted ways as they took different stances on how data analysis or ‘coding’ enables this to occur. Strauss and Corbin emphasised coding as analysis, with prescribed tools, while Glaser preferred the creative immersion in the data that avoids imposing preconceived frameworks (Wertz, 2011). Charmaz takes the view that Glaser’s approach tends towards positivism, because he believes truth is discoverable (Charmaz, 2011). However it seems both Glaser and Strauss acknowledge that the method is subjective, that the researcher acts in excavating a theory from the raw data, intervening, conceptualising and abstracting to weave texts, codes and constructs together in a useful theoretical bricolage (Glaser, 2008; Strauss & Corbin, 1997; Walker & Myrick, 2006). A

useful grounded theory is “steeped in relevance” but cannot be disconnected from the research processes that created it (M. A. Grant, 2010).

A key principle of GTM is that known theory is set aside, only to be used if data analysis points to its relevance (Charmaz, 2014; G. Gibbs, 2007). Urquhart and Fernandez (2013) point out that this does not mean the researcher is a ‘blank slate,’ but rather that comparison with existing models or theories is only undertaken after analysis has enabled patterns to emerge from the empirical data. Setting aside preconceptions is never completely possible, but by deferring a major literature review until later in the research process, the researcher is able to emulate the non-committal stance commended by Dey’s “open mind not empty head” aphorism (Dey, 1993). Urquhart recommends a provisional literature review that complies with academic requirements, but does not privilege concepts or constrain the coding; this, she says, will protect the “key delight” of emerging theory (Urquhart, 2013, p. 17).

In grounded theory, data collection and analysis are often integrated in an iterative inductive process, whereby the researcher dives into analysis immediately data collection has begun, and uses constant comparison to reveal contrasts and commonalities. For this project, interviews were set up in various New Zealand cities within the time frame of my visits, so any major coding exercises needed to wait till those were complete. However themes and possible categories did emerge and were able to be incorporated into the later interviews in the process of theoretical sampling, one of the methods developed by Glaser and Strauss. Deep engagement with line-by-line transcripts began at the end of data collection, and the constant comparison strategy was applied to the transcripts themselves.

3.6.3 Methods: Document Analysis

The two denominations, from which the research sample of interviewees was sought, have online documents and policies which I was able to examine and distil into a useful description of how clergy review is understood and practised in the two similar but distinctive contexts. This is found in the section of Chapter Four entitled *4.2 Findings on Evaluation of Clergy in Two NZ Churches*.

In the case of the Presbyterian Church of Aotearoa NZ, the documents I consulted included the Book of Order, the Conditions of Service Manual, and specific regulations and texts relating to the national Ministry Development Programme that was introduced in 2010. In 2011 I had voluntarily attended the training for Presbyterian MD reviewers, with a view to undertaking this research project, and so had available documents from that workshop, as well as the updated 2013 version. I corresponded with the Leadership Subcommittee of the Presbyterian Church of Aotearoa New Zealand (=PCANZ) when I had questions. I also had notes taken in various conversations with four “denominational

insiders” who had offered to share their thoughts as background, prior to the research itself. These included reviewers, reviewer-trainers, and other denominational leaders. Those conversational consultations were not research data, and so were not recorded or transcribed, nor was confidentiality discussed, but I have endeavoured to keep their background material generic out of respect for their generous input.

The Baptist Churches of New Zealand have a congregational (local governance) polity and therefore few formal regulations that apply nationally. The BU Administration Manual contains recommendations for clergy terms and conditions, as well as templates for reviews. I was able to gain a historical overview by accessing the archive of articles in the 135 year old NZ Baptist magazine, and this provided valuable insights into how pastor performance has been managed over time. I was also able to arrange useful conversations with three “denominational insiders” from the past/present Head Office team, as well as a representative of Carey Baptist College.

In both churches, the national headquarters of the denomination facilitated my soliciting of research participants through advertisements in the web-based monthly church newsletter; the documentation used is provided in the Appendices.

3.6.4 Methods: Purposive Sampling

Recruiting a sample of at least fifteen participants was undertaken using volunteers who responded to an invitation sent out by e-newsletters to all ministers of the two subject denominations in New Zealand. Some boundaries were set to minimise confounding factors, so chaplains, missionaries and associate ministers were excluded, as were my work colleagues and relatives. Gender, marital status and ethnicity did not need to be constrained, but I decided to limit the sample to clergy leaders, in full standing, who had experienced two or more reviews; clergy reviews for this project were defined as “the organisational exercise of appraising the minister’s performance, undertaken at intervals of 1 – 3 years.” The publicity garnered ten volunteers who fit the criteria, but that sample was heavily weighted with palangi men, so I purposively recruited two Pacific Island Presbyterian ministers (Plowright, 2011). They were not offended to be asked for that reason; I also invited two more women ministers. I travelled to both the North and South Islands, visiting cities and towns, and late in the process recruited one more Baptist minister who had been recommended by a denominational insider. The final interview sample included seven Baptist ministers and eight Presbyterians.

Three women and twelve men approximates the proportion in the minister population in the two denominations in NZ. Age ranged from 47 to 67 years with the mean being 55, again typical of the senior minister population I was targeting. 11 pastors were serving in

the four main cities, and four in provincial cities or towns. Ministry experience ranged from 5 to 35 years with 22 years as the mean. Using the definition of clergy review I had publicised, all had at least two past reviews, and some had nine or ten. Two Presbyterian participants were also reviewers.

I did not specifically query ethnicity but it was self-identified in three cases (Samoan, Cook Island, Tahitian). Past work experience was also self-identified in nearly all the interviews and included teaching, health, engineering, IT, corporate sector, and public service. Thirteen of the group attend supervision regularly. Most of these attend once a month but three go less than that due to geography. Of the two who do not attend, one has historically had regular supervision and spiritual direction but is now in a different context. The other has never attended supervision as such.

Once the transcript was available I changed any reference to the person's name in the interview itself, and in the demographic data, to the pseudonym. There is no connection between the individual research interviewee and any real, imagined, or Biblical person of that name and any similarities observed are completely inadvertent. Appendix 6 contains a list of the participants' pseudonyms with non-identifying demographic data.

3.6.5 Methods: Clergy Interviews

The main research method for this project was depth interviewing, with digital recording, professional transcription and line by line analysis. Interviews are socially-situated speech events, a joint product of interviewers and respondents (Kitchen, 2013). Used in interpretive inquiry, they recognise the ubiquity of biography in human experience, and focus, not just on events, but on the meanings those experiences hold for the interviewee (Chase, 2008). The essence of interviewing is the establishment of a human-to-human relationship characterised by the desire to understand (Fontana & Frey, 2008).

There is an extensive literature in the Qualitative disciplines with guidelines for conducting effective interviews (Fontana & Frey, 2008; Kvale, 2007). Skills needed are intensive listening, careful planning and the ability to step in and out of the researcher role (Qu & Dumay, 2011). Sufficient preparation is needed to develop expertise in the interviewee's context so that informed questions can be asked with respectful curiosity, and valuable interview time is not spent on details that can be sourced elsewhere (Qu & Dumay, 2011). Semi-structured interviews that prove most useful in this research context can range from highly scripted interview guides to a relatively loose approach based on human conversation (Qu & Dumay, 2011). Hannabuss (1996) notes a number of important skills for a qualitative interviewer:

1. to establish rapport
2. to keep discussion going

3. to avoid squelching responses with closed questions, jargon or bias
4. to be able to tolerate pregnant pauses
5. to adopt a non-judgmental attitude
6. to know how to focus and pace the interview.

I believed I had the interviewing skills to use a wide range of contextual questions, and to modify their style, pace and order so as to uncover the salient features of the individual's understanding of their job, their work environment and their organisational culture (Kvale, 2007; Qu & Dumay, 2011).

Although an open-ended interview, of itself, supposedly offers “an authentic gaze into the soul” (Atkinson & Silverman, 1997, p. 305), interviewing is “inextricably and unavoidably historically, politically and contextually bound” (Fontana & Frey, 2008, p. 695).

“In an interview conversation, the researcher asks about, and listens to, what people themselves tell about their lived world, about their dreams, fears and hopes, hears their views and opinions in their own words, and learns about their ... work situation, family and social life. The research interview is an inter-view where knowledge is constructed in the inter-action between the interviewer and the interviewee.... The personal interrelationship with the unfolding of stories and new insights can be rewarding for both parties of the interview interaction. Reading the transcribed interviews may inspire the researcher to new interpretations of well-known phenomena. And interviewing can produce substantial new knowledge to a field.”

(Kvale, 2007, pp. 1, 7).

The researcher needs to employ respectful curiosity in giving voice to the participant by using invitational ‘clean’ questions and a self-reflexive approach to listening (Charmaz, 2014; Chase, 2008; Tompkins & Lawley, 1997).

I found Alvesson's typology of theoretical perspectives on the interview method a useful lens for reflexivity. He distinguishes neopositivism (studying facts, where the interview is a pipeline for truth) and romanticism (studying meaning, where the interview is a human encounter) from a third perspective, localism, where both respondent and researcher are actively constructing ‘truth’ and the interview is an opportunity to explore and even create meaning (Alvesson, 2003). The both/and nature of the third perspective fits with my critical realist epistemology; unlike postmodern paradigms which suggest there is no real world, only one we create, I sought new horizons of knowledge while simultaneously remaining “committed to the empirical description of everyday life” (Fontana & Frey, 2008, p. 719). Qu and Dumay meld Alvesson's tripartite typology with the three classic interview formats – structured, semi structured and unstructured - to match an interview method to each paradigm; they confirm that semistructured interpretive interviews are most appropriate to the critical reflections of the localist perspective (Qu & Dumay, 2011). I prepared a brief interview guide that included rapport-

building and demographic inquiry, and several open-ended generic questions about the research topic, as well as some more focussed ones, a back-up in case the participants “dried up”. Once we had attended to issues like phone calls and road noise, the interviews all flowed well, averaging one hour and covering a range of topics guided by my indicative questions plan but also following the participant’s interest and energy.

As I reflected on my role during the interview season, I realised I was indeed taking a localist perspective and that my knowledge, power, age, gender, ethnicity and denominations was indeed influencing the interviews (Alvesson, 2003; Qu & Dumay, 2011). I did engage with the stories told, and the thoughts and emotions revealed, and in a sense helped constructed the interviews through my own knowledge and concerns. However the flow of the interviews and the responses of the participants reassured me that what I did contribute was helpful rather than obstructive. No one withdrew or triggered a pastoral care concern; in one case the participant later requested that I exclude pages of transcript that revealed sensitive details of a pastor termination.

The Appendices contain the Interview Guide and two samples of my interviewing style, one from each denomination.

3.6.6 Methods: Interview Analysis

Analysis begins as soon as a researcher starts a project; Malterud calls this the reading glasses with which we interrogate experiences (Bailey, 2007; Malterud, 2001). Two main Grounded Theory methods applied extensively to analysis in this study are the use of memos and coding. Memo-ing is a key activity of Grounded Theory Methodology; theoretical memoranda are informal analytic notes that are eminently useful for exploring emerging concepts in the data and linking them to existing theory (Charmaz, 2014; Henwood & Pidgeon, 2003). Memos document thoughts and emotions in ‘notes to self’ about discoveries, doubts and decisions, and help create, define, and refine conceptual categories (Bailey, 2007; Denzin & Lincoln, 2008; Fontana & Frey, 2008). They can be utilised any time between data-collection and report-completion, but most usefully apply during data analysis (Glaser, 2013a). Keeping memos and data separate helps the process of abstraction and enables concepts to be amended; coding and memoing are both iterative processes (Bailey, 2007; Urquhart, 2013).

Memos capture thoughts and ideas that occur to the researcher during the coding and analysis, and although expected to remain private, they often provide the foundation of a paragraph in the later writing up of the project (Charmaz, 2014). Several researchers have noted that memos can also be used as reflexive statements to be incorporated into the findings, so my subjective responses were noted as well (Bailey, 2007; Charmaz, 2011, 2014; Denzin & Lincoln, 2008). Memos were written on theoretical subjects like

“the notion of performance” and practical themes like “in vivo phrases,” as well as hand-drawn mind maps as I attempted to build theory; see Figure 2.



Figure 2: Example of use of codes and memos, Clergy Review Study, September, 2015

Coding is about data reduction, simplification, and revelation of meaning, as words are considered and categorised; “coding is analysis” (Miles and Hubermann, 1994, p 56, cited by Bailey, 2007, p. 133). Codes are tags or labels which assign units of meaning to the research data, and are attached to words, phrases, sentences, or whole paragraphs, and function like the index of a book (Gläser & Laudel, 2013). Almost all qualitative analysis techniques utilise codes and the differences between methodologies are subtle, but what distinguishes Grounded Theory is the shift from literal description to a conceptual model, building or augmenting theory (Bailey, 2007; Charmaz, 2014). With my background in biblical hermeneutics, I was well-equipped for finding meaning and connections in the sample of clergy interviews (G. Gibbs, 2007, 2010). I had conducted a pilot coding project in 2014 and knew that insights do not emerge from the data “like daffodils” in spring (Bailey, 2007, p. 127). Data analysis is reputed to take 2–5x as much time as data collection and my experience was at the upper end of that spectrum (Bailey, 2007). Notes of selective and theoretical codes were used on a sheet of soft board on the garage wall and changed, moved and covered in the many iterations of the data analysis.

I had started thinking about codes early in the data collection phase, and found that there were many commonalities in the stories participants told or the questions they proffered. Most of the common themes were shared by pastors of the two denominational groupings, possibly due to the fact that the governance systems are similar. The technicalities of the PCANZ Ministry Development review system were only raised by Presbyterians.

Using the Grounded Theory method of theoretical sampling I began introducing common themes from earlier participants into the later interviews and found this enriched the data. I probed, for example, into the intriguing notion that a review is way of testing the validity of one's call to a particular parish. I was unable to go back and ask people about themes, or check my theoretical constructs, at a later date, due to the travel needed for many interviews. However there was sufficient depth in the interviews that for this not to be a concern.

I was helped in planning the coding phase by Tams' (2008) in-depth grounded theory approach based on Charmaz' methodology (2014). In a four step iterative process, outlined in Table 1, Tams first generated 100 "open codes", then ten core categories; these were grouped into four higher-order concepts in a theoretical matrix of self-efficacy (Tams, 2008). This process enhances abstraction and often enables the telling of "an analytic story"(Charmaz, 2014, p. 150). A fourth collaborative stage was aimed at improving clarity and construct validity. I considered this application of Charmaz' approach to be a useful step-by-step template for data analysis and interpretation, and followed the outline in Table One for coding and analysis in the research project. Open Codes were generated directly onto the transcripts by hand, by scrutinising the data line by line, and were then simplified into clusters of phrases that meant the same thing. There were hundreds of open codes, and most of them overlapped between participants.

Process	Tams/Charmaz Method
Open Coding	Initial codes are generated line by line to assign meaning to myriad 'data chunks'. Analytical tags, not just descriptions, are preferred and where possible expressed as gerunds (-ing) which helps "detect processes and stick to the data" (Charmaz, 2014, p. 120). Codes are merged and filtered to produce provisional concepts, or low-level categories (Bailey, 2007; Tams, 2008).
Focussing	Open codes are distilled into higher-level selective codes interpreting participants' experiences, thoughts, feelings, and actions, relating to their work, people and organisation (Charmaz, 2014; Tams, 2008). Some codes would take the form of <i>in vivo</i> labels, extracted from the participants' actual words to help preserve their meaning (Charmaz, 2014; Flick, 2009).
Theorising	An integrated theoretical framework is built around core categories in an iterative process of constant comparison of data and concepts, within and between the transcripts (Flick, 2009; Malterud, 2001). Charmaz recommends explicating implicit actions and meanings, crystallizing the significance of the points, comparing data with data and identifying gaps in the data (Charmaz, 2014, p. 125).
Validation	Rather than checking for statistical significance, qualitative research looks at trustworthiness and credibility which can be attained through robust research design and the corroboration provided by constant comparison.
Table 1: Summary of Grounded Theory Coding Process	

In the first iteration of selective coding about fifty codes were identified; these were revisited in a second round that built convergence around eleven core categories, described in the interviews and explicated by the document analysis. Much thinking, writing and sketching led to the discovery of five Theoretical Constructs which I believe are the salient features of Baptist and Presbyterian clergy review in NZ. These were named and renamed several times, as transcripts and coding sheets were constantly compared, to produce five words – Conversation, Formation, Collaboration, Imagination and Vocation - that exhibit a pleasing assonance and fit the data findings well.

Figure 3: Miner, traveller or archaeologist? Reflections on discovery

Kvale (2007) and Qu and Dumay (2011).



Two useful contrasting metaphors of the research process represent different epistemologies and therefore conceptions of the goal of the research interview. Thinking about these useful images brought a third one to mind.

The Miner:

Truth is buried metal to be unearthed; knowledge is already there, waiting to be discovered. Mining the objective data is implied in positivist research.

The Traveller:

The researcher travels with locals, listening to their stories and differentiating their meaning in the narratives retold back home. This more participatory metaphor describes social construction.

The Archaeologist:

In the Middle East reconstructions of ancient dwellings are built up from a footprint unearthed by archaeologists. Using their knowledge and skill, but also their imagination, these experts reconstruct an ancient building, and the blue line signalling the transition between excavation and reconstruction is almost imperceptible. My role as researcher was to unearth some realities on which I might construct a credible theoretical house; the third metaphor fitted with my localist perspective and the preconceptions of my critical realist ontology.

3.6.7 Methods: Theory-building

At the core of Grounded Theory's data analysis is the aim to build a substantive theory, a coherent representational framework that will have disciplinary utility, contribute to the academic literature, or just provide the reader with "the joy of savoring an original idea" (Charmaz, 2014, p. 260). Theoretical coding is the pivotal stage where codes and constructs are related to each other in an integrated analysis, an abstract model that through the researchers detailed work has 'emerged' from the data without 'forcing' (Glaser, 2013b). This stage of generating a substantive theory is often neglected by

researchers who claim to be using Grounded Theory Methodology (Charmaz, 2014; Urquhart, 2013). Reflections on discovering theory are offered in Figure 3.

A researcher's coding decisions are often mysterious, and Urquhart recommends explicating them with *in vivo* examples represented in a series of tables. Table 2 shows an early stage of assigning selective codes to a theoretical construct:

Theoretical Construct	Selective codes	Open codes
Minister Self awareness (later renamed <i>Formation</i>)	Understanding self	Knowing strengths, knowing weaknesses, using a diagnostic tool,
	Understanding others	Listening, agreeing to disagree, managing conflict
	Using outside wisdom	Accessing supervision, being mentored, hearing the truth, reading leadership books, reading mental health books
	Experiencing a review	Being encouraged, being hurt, being devastated, being motivated, setting goals, making changes
	Testing the call	Asking questions, wondering about the future, feeling anxious
	Stress and Burnout	Experiencing stress, recounting others' experiences, saying no, taking time off
	Clinical depression	Being diagnosed, being judged, recounting others' experiences

Table 2: Identifying Relationships between Open, Selective and Theoretical Codes

My background in biblical hermeneutics (the science of interpretation) facilitated the step from concrete descriptive codes to abstract categories. Dwelling on the meaning behind the words led to conceptualisation of how the selective codes related to each other. Some words assigned came from the discipline of Human Resource Management, and some from the organisational culture of church.

Table 3 overleaf is an example of the kinds of selective codes used and how they fit into some broader categories; these were serially renamed to become the five interrelated theoretical constructs:

REVIEW		DENOMINATION		PASTOR		CONGREGATION		MISSION		
Review Experience	Review Admin	Review Follow-up	Testing the call	Self awareness	Vocational learning	Congregational Feedback	Past conflicts	Parish Review	Vision and planning	Experiencing God
Having a mandatory review (Pres)	Review programme concerns	Concerns about reviews	Thinking about the future	Emotional intelligence - strengths and weaknesses	Study leave and Professional development	Choosing a review panel	Previous pastors	Parish-wide reviews	Mission discussions	Experiencing God in a review
Having a discretionary review (Bapt)	Review tool concerns	Concerns about reviews	Affirming the call	Self-awareness and self care	Academic books and courses	Sharing a report	Previous churches	Using an outside reviewer	Clarifying and communicating vision	Not experiencing God in a review
Not being reviewed	Reviewer competency concerns	Having teeth	Fragility of call	Appreciating and using a supervisor	Management books and courses	Not sharing a report	Pastor killing churches	Reviewing the elders	Having a missional perspective	Experiencing God in a team
Concerns about Bapt reviews	Review records	Goal setting	Terms of call	Not having a supervisor	Learning from other churches	Working with people		Size of church	Change management	
Responding to a report document	Review timing	Termination	Privilege of call	Experiencing stress, burnout and depression	Retreat and Sabbatical	Using people's gifts				
Being a reviewer	Not receiving a report			Surprises	Accessing collegial wisdom	Managing conflict				

Table 3: Five features of Clergy Review with their selective codes,
Clergy Review Study, September 2015

Table 4 shows the evolution of the constructs and their names, though they were not as linear as the chart suggests:

Church words	profession ordination denomination alignment calling vocation	pastor identity self-awareness clergy ministry development formation	mission neighbourhood purpose planning outward focus dreaming revelation	review panel elders congregation parish church communication collaboration	review appraisal accountability development pastoral tie conversation
tagline	call	awareness	imagination	communication	conversation
HRM words	staffing deployment recruitment and retention compliance	professional development emotional intelligence	vision and values change management strategy	communication feedback organisational culture conflict	performance management quality assurance engagement fit
looking	back	in	forward	between	around
Final Choice	Vocation	Formation	Imagination	Collaboration	Review Conversation
Table 4: Constructs considered for Theory Building.					

Although Strauss and Corbin (1997) advocate a technical approach using prescribed analytic tools, I found Spradley's nine semantic relationships a more useful starting point:

- Is a kind of
- Is a part of/place in
- Is a way to
- Is used for
- Is a reason for
- Is a stage of
- Is a result of
- Is a place for
- Is a characteristic of (Spradley 1979, cited in Urquhart, 2013, p. 43).

In exploring possible connections I found that review was both “a way to assess” and “a way to develop” the four main constructs, while they, in turn, were connected with a review experience and with each other. Formation, Collaboration, Imagination and Vocation are “key competencies evaluated in” a clergy review but also “by-products of” the review conversation. Finally they answered the research question because they are “salient features” of clergy review.

The final choice of the word “conversation” to describe the formal clergy review was influenced by the contrast between a mechanistic approach often applied to performance management in the business sector, and the more participatory styles frequently applied in the social and voluntary sector. A conversation implies two parties in dialogue, looking together at past events, present practices and future goals, without the intimidation or jeopardy often experienced by employees who hate their performance appraisals (G.

Roberts & Pregitzer, 2007). A conversation allows evaluation to take place within a trusting relationship where problems are perceived as objective issues to be solved rather than personal inadequacies to be addressed. Within that conversation, key issues of vocation, formation, collaboration and imagination can be identified and explored.

Construct: Formation

The theme of individual growth and responsibility was originally labelled Identity. Self-awareness, Self-management, and Emotional Intelligence came later, and finally Formation. This last iteration was selected to include the spiritual dimension, assumed but not mentioned explicitly by clergy, because it is integral to their identity as a minister.

The term Formation is a word from the Christian tradition that refers to the shaping and growth that occurs in a person over their life journey, allowing them to develop awareness of, and responsiveness to, themselves and others (Wourms, 2007). Much wider than academic learning, it means personal growth in multiple dimensions, including spiritual, intellectual, social and emotional. This life-long journey of transformation parallels the sphere of Professional Development in the Human Resource Management discipline. When business leaders engage in training, practice or group experiences that enhance their communication skills, empathy, and concern for wellbeing, they are being 'formed'. The development goals agreed in a clergy review are an expression of ministerial formation.

Construct: Collaboration

The construct that links the clergy review with local leadership was originally called Review Panel, broadened to Communication and Conflict, then Feedback Culture, a useful concept from the HRM context. The word collaboration came into focus as so many of the stories told and difficulties experienced were in the context of shared leadership in the local church. All participants led churches where governance responsibilities are undertaken by a team comprised of clergy and non-clergy leaders. Participatory styles of decision-making are used in many business contexts today and are enshrined in the polity of both denominations. They are an effective means of safeguarding wide ownership of strategy, but they do provide some interpersonal challenges which often surface in a clergy review.

Construct: Imagination

The third construct was related to the minister's role in leading collaborative planning and a vital sense of the mission of the local church. HRM terms that came to mind were Vision, Strategy and Change Management, but the transcripts on these themes testified to pastors' awareness that vision is a process in which the God the Holy Spirit is intimately involved. In searching for a term that embraced that mystical dimension I

decided on Imagination, a word that is used in contemporary Christian literature to describe transformational leadership in a post-modern culture (Strom, 2014). Imagination is not strictly an HRM term, but words like innovation, inspiration, vision and dreams are often found in the strategic HRM literature. Many HRM practices including performance review and are designed to release imagination, ingenuity and creativity in the work place (Fleetwood & Hesketh, 2010). Since the 1960's succession planning at Shell Oil has included Imagination in its list of four desirable competencies for executive positions (Chua, 2015). Clergy reviews today often address the effectiveness of the minister in stimulating the parish's 'missional imagination' (Roxburgh, 2011).

Construct: Vocation

The fourth construct, Vocation, came about because there were wider denominational dimensions to the reviews, even in Baptist churches with an independent congregational polity. Because the performance review with knowledge workers is important in protecting and engaging valuable human talent, the idea of retention appealed and this was later widened to recruitment and retention. As the theme of testing the call or pastoral tie came through, and raised issues about termination of the call, the word vocation seemed more apt. Vocation is an ancient word meaning call, and used to refer only to people whose work was altruistic, like teachers or nurses (Zech, 2010). Today however an increasing number of careers are positioning themselves as vocation in a more inclusive conceptualization that emphasises meaning and personal fulfilment in one's work (Steger, Pickering, Shin, & Dik, 2010). Certainly religious people, including clergy, are likely to see their career as a calling, and to find meaning and affirmation in their work that is exemplified by the word vocation.

The constructs of Conversation, Formation, Collaboration, Imagination and Vocation represent the data faithfully and offer the possibility of presenting the findings in a theoretical diagram. A shape constructed from the codes excavated from my participants' data could suggest causes and connections in realistic and hopeful reviews, and inform HRM practices in churches.

4. Evaluation of Clergy

- *This chapter completes the provisional literature review by exploring historical and global practices of clergy evaluation, other than in the two New Zealand churches represented in the sample.*
- *The document analysis of current Presbyterian and Baptist policies and praxis for ministry review in New Zealand is presented*
- *In addition to information discovered in documents available in the public realm or provided by the national arms of the churches, some helpful background was provided by “denominational insiders” who were not part of the research sample. These personal communications are denoted by an initial (signifying Baptist or Presbyterian), and the date of the conversation.*

A United Methodist statement on the purpose of evaluation states:

"Evaluation is natural to the human experience. Evaluation is one of God's ways of bringing the history of the past into dialogue with the hope for the future. Without confession of sin there is no reconciliation; without the counting of blessings there is no thanksgiving; without the acknowledgement of accomplishments there is no celebration; without awareness of potential there is no hope; without hope there is no desire for growth; without desire for growth the past will dwarf the future. We are called into new growth and new ministries by taking a realistic and hopeful look at what we have been and what we can still become. Surrounded by God's grace and the crowd of witnesses in the faith, we can look at our past unafraid and from its insights eagerly face the future with new possibilities" (Hudson, 1992, p. 7)

Clergy evaluations already occur informally, in car parks, telephone calls, and over Sunday lunch (Beal, 2010). Lay people evaluate performance as their pastor preaches a sermon, leads the sacraments or appears at a hospital bedside. Impressions of clergy competence are also formed in the wider church, so that ministers are often aware of their colleagues' "strengths and weaknesses, achievements and failings, talents and foibles" (Beal, 2010, p. 57). But this informal appraisal is not systematic, nor is it collated in a format useful for planning ministry development. Finding orderly and caring ways for evaluation to occur is essential for faithfulness to the individual and corporate call to ministry (Hudson, 1992). A strict business model of performance management may not fit the realities of parish ministry, but effective practices can be learned from other contexts. Ministers are not the only multitasking professionals who have hard-to-measure multifarious tasks to perform, and operate in a largely unsupervised manner (Beal, 2010; Peyton & Gatrell, 2013). Systematic performance review has become ubiquitous as a quality assurance mechanism in education, health care and social work. Embedding PR into a non-business setting can be challenging, say Azzone and Palermo (2011), who recently researched the implementation of performance reviews into the Italian public service. They found the adoption of robust processes was hindered by friction, coalitions and environment turbulence, as well as a lack of technical expertise, and reluctance to reward individual initiative (Azzone & Palermo, 2011). They also noted

that the causal ambiguity that applies in non-commercial organisations like education and health can mean complex situational factors are outside the control of individuals (Azzone & Palermo, 2011; Speckbacher, 2003). Church culture exhibits a similar complexity, so can these evaluative mechanisms be usefully applied in managing and protecting the church's human resources?

4.1 History and Practice of Evaluation of Clergy

The primary document for information about evaluation in the Judaeo-Christian tradition is the Bible, a centuries-old source held to be trustworthy by followers of Jesus Christ and leaders of Christian churches. The Bible narratives present myriad examples of accountability and responsibility, ranging from the ancient Jewish practice of elders deliberating at the town gate, to detailed advice to fledgling churches in first century Greece and Turkey (see Appendix 5 for this and other Bible references). The relationship between God and humanity is presented as one of mutual responsibility, where people are created to love and serve God, who in turn loves and cares for them. The stories of Exodus, Exile, priests and prophets portray regular cycles of blessing, disobedience, evaluation and judgment (Bowater, 2008), and of God acting to restore the relationship in grace and forgiveness (Auckland Presbytery Ministerial Certification Task Group, 2008; Bowater, 2008). Jesus' earthly life portrayed the same interplay between the kindness and sternness of God; he condemned the Pharisees for their hypocrisy, and judged his own disciples for their greed and hubris, yet affirmed a prostitute's worship, and saved the life of a woman caught in adultery. Christians understand the death and resurrection of Jesus to be the final answer to the need for reconciliation between Creator and created.

The New Testament makes it clear that all Christians are expected to give account of how they use the talents and gifts with which they have been entrusted, and leaders even more so. Church leaders, variously called bishops, pastors and elders, have a higher responsibility and accountability. Like false leaders of the ancient Hebrews, they are warned about leading people astray and advised not to lord it over the people assigned to their care, but to lead by example. Church leader Timothy was instructed to ensure that bishops were above reproach, and that those who work hard should be paid well. Gentleness with someone 'caught in wrongdoing', is held in balance with robust confrontation of misconduct, undergirded by grace that seeks ways to forgive and restore. The apostle Paul had a parting of the ways with John Mark, but later they were back working together; Jesus restored Peter to leadership after he had denied his relationship with the Master. The heart of the Christian gospel is that humanity does not, and cannot, measure up to God's standards, it is always a work in progress, and so

evaluation of ministers must be “applied with the wisdom of grace” (Bowater, 2008, p. 2).

Documents from the early church continue the theme of accountability. Bishops (*episkopei*) acted as overseers of regional churches, and examined and monitored the clergy they ordained (Hopko, 2010). A first-century letter from the Bishop of Rome tells the clergy in Corinth to straighten themselves up and to get in order (Clement of Rome, 96). By the sixth century, regulations governing a bishop’s visitation – a periodic inspection of temporal and spiritual affairs in a diocese – were documented (Cross, 1958b). In mediaeval times, episcopal visitations were held every two or three years and while the work was often delegated to commissaries, cases of offence by clergy were tried by bishops under Canon Law (Cross, 1958b). This form of clergy evaluation continued on in various forms in the churches after the Reformation. These practices in a range of traditions were explored as part of the provisional literature review recommended for grounded theory study (Urquhart, 2013).

4.1.1 The Roman Catholic context

Beal, writing about evaluation of Catholic clergy in the centuries between the Council of Trent (1545 – 1563) and the Second Vatican Council (1962 – 1965), notes that assessing the performance of priests was seen as both possible and appropriate (Beal, 2010). During that time, inadequate theology and pastoral incompetence were identified by an examination system, and by the time the 1917 Code of Canon Law was in place, vast improvements had occurred (Beal, 2010). Clergy were better educated and seminary-trained, and identification of unsatisfactory performance could lead to loss of religious authority and seniority (Beal, 2010). The reforms of Vatican Two in the twentieth century removed most of these tests of ministerial competence, and despite the adoption of the notion of ‘best practice’ as seen in other professions, Beal suggests that no comparably robust system exists today. Sharon Messina’s review of Human Resource Management in Australian Catholic churches notes how “inadequate managerial or leadership skills, and insufficient training and support” have led to overworked pastors, burnt-out priests, inadequate remuneration, secret negotiations, lack of due process, and bullying tactics” (2007, p. 26). Zech (2010) concurs; in “Best Practices in Catholic Church Ministry Performance he addresses the lack of PME training, controlling behaviour of priests, and reluctance of parishioners to criticise those fulfilling a sacred calling.

4.1.2 The Anglican context

The notion of appraisal is disconcerting to many clergy in the Church of England, whose ‘freehold’ status, entailing security of tenure, is characterised by a freedom to determine their own working life on “a spectrum from dedication to indolence” (Peyton & Gatrell, 2013, p. 98). Nevertheless there have been efforts by most bishops to introduce review

schemes, whereby clergy reflect on their work and priorities (Diocese of Lincoln, 2006; Eastell, 1994). Resistance has been pervasive, with some asserting that their accountability is to God alone and is their own responsibility (Peyton & Gatrell, 2013; Samiento, 2008). However it is also seen as appropriate by both church and state that clergy should be supported and protected by legislation, as well as having a clear professional framework to their performance (Samiento, 2008). In New Zealand too, the last fifteen years have seen Anglican dioceses explore the dimensions of performance management and “build a culture of review” by developing tools such as Appreciative Inquiry and 360 Assessment (Diocese of Auckland, 2000; Harrower, 2010, p. 6).

4.1.3 The Methodist context

The Methodist church had its roots in Anglicanism, but Wesley’s discipleship practice of class meetings sharpened up dimensions of shared accountability and responsibility (Guerrier & Bond, 2013). The evaluation of New Zealand Methodist pastoral leaders follows practices similar to other traditions, with reviews after a set number of years being facilitated by a team from outside the parish seeking input from members; an expected outcome is a schema of professional development goals (Dunedin Methodist Parish, 2009). A United Methodist minister in the USA describes the confusion over how best to evaluate pastors, and mentions numbers of new evaluation processes developed by his denomination in recent years (McLean, 2000). He coins the term “loyal opposition” in reassuring clergy that their harshest critics are usually a skewed and vocal minority, and recommends taking more heed of those in the middle ground (McLean, 2000, p. 38). In the UK, a recent study among Methodist circuit ministers identified them as “reluctant managers”, discomfited by management language despite the fact that their role in today’s ecclesiological and legislative environment clearly requires management skills (Guerrier & Bond, 2013, p. 686). This reluctance aligns with that of clergy of other denominations who decry the use of business concepts to describe and measure their work (Peyton & Gatrell, 2013; Piper, 2003; Roxborough, 2002; Zech, 2010).

4.1.4 The Reformed context (includes Presbyterians)

The Reformation brought a democratisation of church governance that in the connectional or Presbyterian tradition saw regional courts called presbyteries taking on the role of the Catholic bishops. Reformed churches around the world share a polity of collective decision-making, which in Reformation times was seen as the best counter to the despotism of pope and bishop; Presbyterianism is said to be “founded on a theology of sin” (Kirkpatrick & Hopper, 1997, p. 131). Historically the Presbytery, or its equivalent, exercised careful oversight over all its congregations, ensuring “the laws of the Kirk are being observed and the work of God’s kingdom advanced” – the corporate bishop (Herron, 1993, p. 676). Each parish was visited once every five years to check on congregational health, building standards and any unsatisfactory circumstances (Herron,

1999). There was a pastoral aspect of care for ministers and their families, but in cases of possible moral aberration, the Presbytery investigated the charge and, if needed, imposed sanctions (Herron, 1993). Today, these functions continue but are implemented in ways that mirror professional development pathways in other sectors. Since 2001, the Church of Scotland has offered its ministers the opportunity to reflect on their life and ministry in a constructive and supportive way through Accompanied Reviews (Church of Scotland Ministries Council, 2014). The Reformed Church of America's Office of Human Resources provides its synods with a pack of eight models for reviewing the performance of ministers (Regional Synod of Albany, 2014). The Christian Reformed Church in North America has published a comprehensive pack of resources under the rubric "Sustaining Pastoral Excellence" (Sustaining Pastoral Excellence Initiative, 2010). Two other models worthy of note in Protestant churches are Mutual Ministry Committees and Appreciative Inquiry Exercises; both are comprehensively inclusive of the wider leadership, and avoid the polarising language of evaluation and appraisal (Branson, 2004; Gugel, 2004).

The current practice of Presbyterians in New Zealand is part of the research findings and will be introduced in a section of its own.

4.1.5 The Baptist context

The nonconformist traditions that arose from the Reformation include several strands that adopted congregational rule, which like Presbyterianism rejected the Roman Catholic hierarchy in favour of the 'priesthood of all believers'. Unlike Scottish Presbyterians however, the English and American Separatists also renounced accountability to higher courts or synods, identifying the local congregation as the locus of spiritual authority (L. Guy, 2012; Kaiser, 2006). The English Baptists adopted this congregational polity and for centuries churches have governed themselves independently, albeit with some union or fellowship of the like-minded often being created to provide training, missions, and insurance (L. Guy, 2012). In this context pastors have been seen as accountable to God for the exercise of their ministry in a spiritually responsive manner, but also accountable to the church that resources them, along with a governance group, to exercise leadership with delegated authority (Beasley-Murray, 2015b). Definition of the pastoral leader's role comes from scripture and the ordination vows; job descriptions or lists of ministerial competencies as such do not seem to have appeared until the 1990's. Even then, the reception to the notion of a minister being appraised against such formulations was mixed (Beasley-Murray, 2015b). However changes to UK charities legislation and presaged widening of employment law to include ministers on 'terms of call' have introduced a new level of accountability to the work of ministry (Thomas, 2014a). Some pastors have used the BUGB "Guided Self-Appraisal", and others have engaged an external facilitator; however it seems experiences of appraisal have ranged from helpful through to "discouraging and even

damaging” (Thomas, 2014a, p. 1). A more professional approach through the recent formation of the College of Baptist Ministers in the UK was spearheaded by Beasley-Murray, a past leader of the Baptist Union of Great Britain, and an avowed advocate of annual review. In 2015, Beasley Murray outlined seven aspects of accountability for Baptist pastors in the UK, including clear job descriptions, regular ministry reports, annual appraisal that addresses health, family and spirituality as well as ministry practice, and continuing ministry development; the list is offset by suggested ways elders can care for their pastor (Beasley-Murray, 2015c). The College defines annual appraisal as “allowing others to help us review our ministries, affirming all that has been positive in the past year, and agreeing the shape of ministry for the coming year” (Thomas, 2014b).

The current practice of Baptists in New Zealand is part of the research findings and is introduced in a section of its own.

4.2 Findings on Evaluation of Clergy in two New Zealand churches

4.2.1 The New Zealand Presbyterian Church context

The word “Presbyterian” relates to the Greek word *presbuteros*, usually translated as elders, and both ministers and elders are seen as presbyters of different kinds sharing in ministry. A dictionary definition of Presbyterianism is “a church governed by elders of equal rank”, pointing to the fact that each presbytery (region), and each congregation, is led by ministers (teaching elders) and lay (or ruling) elders in partnership (Lachman, 1993; Presbyterian Church of Aotearoa New Zealand, 2008c). New Zealand Presbyterians look to the Church of Scotland as their *tupuna*; congregations of this denominational *iwi* were planted by settlers in New Zealand in the nineteenth century. The Presbyterian Church of Aotearoa New Zealand’s 375 parishes are attended by an average 26,000 adults and 5200 young worshippers weekly, and are led by 250 ordained ministers, traditionally known as ‘teaching elders’ (Gault, 2014). These churches follow a governance structure based on a hierarchy of Church courts, rather than individual leaders (Presbyterian Church of Aotearoa New Zealand, 2008c). The highest court is the biennial General Assembly, a collaborative gathering of clergy and lay (‘ruling’) elders who together have power to rule on matters of doctrine and practice for NZ ministers and congregations, whatever their individual views. However, various levels of structure and accountability mean that in general, consensus is needed for any radical change to be enacted (Presbyterian Church of Aotearoa New Zealand, 2008c). Presbyterians place a high value on Scripture as the guide to faith and life and, like their Scottish forebears, expect the Presbytery, rather than the congregation itself, to oversee and evaluate ministry (Presbyterian Church of Aotearoa New Zealand, 2008c). People often joke about Presbyterians’ penchant for committees and meetings, but Kirkpatrick points out that the 16th century architect of the tradition, John Calvin, thought carefully

about the ingredients of Reformed polity. Presbyterians today are his “ecclesiastical heirs,” he says, and this church's methods and procedures epitomise “a community of believers who trust one another in process” (Kirkpatrick & Hopper, 1997, p. 140).

During the twentieth century, the presbyteries of the PCANZ followed the Church of Scotland practice of quinquennial visitation, whereby every five years an *ad hoc* team, made up of elders and ministers from other parishes in the Presbytery, attended services and met with the ministers, elders, and where desired, members of the congregation. Their task, according to polity adopted in 1982, included a number of facets, including helping a parish “assess its own life and work and its effectiveness as it invites people to share in the life and mission of the church, to stimulate discussion and planning for areas of ministry” (Presbyterian Church of Aotearoa New Zealand, 1982). Although it was not focussed particularly on the clergy, most ministers saw it as a kind of “performance evaluation”, and an opportunity to reflect with other leaders about mission and ministry. Suggested questions to be asked of the ordained ministers included *What are the areas of greatest satisfaction in your ministry? What are the areas of frustration?* and *Is the Manse a comfortable and workable unit and adequate for its purpose?* Many found this review process helpful, but there were concerns when inexperienced or incompetent ministers and elders were charged with the task. By the late 1990’s, Presbyteries were asking whether there was a better way; in Auckland Presbytery, consideration was given to training a special group of skilled assessors who undertook all the visitations.

The discontent was, however, dealt with in another way; for years, the Leadership and Mission committees had seen the need for more robust definitions of what it is in ministry that we are evaluating. This would inform the theological college, the national committee assessing candidates for ordination studies, and the presbyteries dealing with routine visitations, as well as inquiries into ministers thought to be incompetent. The Mission Resource Team, a group of regional ministry advisors, developed a protocol for “Healthy Congregations” and began experimenting with available tools for individual Ministry Appraisal (Diocese of Auckland, 2000; Equipping the Leadership Policy Group, 2004; PCANZ General Assembly Office, 2014). The term Performance Review, familiar to church members from other organisational contexts, was studiously avoided (PCANZ Leadership Sub-committee, 2015).

In 2004, EtheL, the Presbyterian Equipping the Leadership Policy Group presented a “competency wheel” to aid reflection on the performance/training needs of ministers and elders, and this was adopted by the General Assembly (Presbyterian Church of Aotearoa New Zealand, 2004, p. 54). A recommendation to implement a mandatory appraisal system was deferred, but the report introduced to commissioners the distinction between formative and summative appraisals, and how they might be used in the future:

8.2.1. *Formative* appraisals focus on personal development and performance improvement, and generally follow a process of self-appraisal.

8.2.2 *Summative* appraisals focus on performance assessment, help determine competency, and generally follow a process of external measurement. It is the summative system that would tie in directly with the discipline of parish goal setting and appraisal ...which generates the criteria against which performance may be measured (Equipping the Leadership Policy Group, 2004, p. 5).

As well as being a useful guide for appraisals and evaluation of ministers from other denominations, the Competency Wheel had begun to inform the work of the National Assessment Workgroup. This team of about 20 ministers and elders met annually to consider and test the candidates for training for ordained ministry. The Framework fed into a useful Assessment Matrix which explicated much of the group's intuitive work of evaluation.

In 2006, major changes in provision of ordination studies were taking place, and the Assembly adopted a proposal from the Leadership Subcommittee (formerly Ethel) to develop a 'Ministerial Practising Certificate' in some form. There were a number of factors contributing to the desire for a reviewable registration system to replace the traditional notion of "minister in good standing". Push Factors included clergy crimes and misdemeanours (now "conduct unbecoming") which cause shame and embarrassment in the church, and are costly in relationships, time and money. The number of 'ministers on the roll' with no clear connection with the denomination or a local parish had also been the subject of enquiry. Pull Factors included the benefits of regular formative appraisal, rigorous professional development and increased collegiality, in a culture where ministers were vulnerable to operating in an isolated and/or unaccountable manner.

In late 2007, an Auckland task group undertook to write a theological rationale for a clergy evaluation/registration programme. This rationale and the regulations for a Practising Certificate were published in a 2008 draft of the programme, in second place after details of the Ministry Review system. The Competency Framework (formerly the wheel) had evolved into nine "aspects of ministry development" and in October the Assembly mandated the Ministry Review System, which would hold its place in PCANZ polity alongside a Parish Mission review process (Presbyterian Church of Aotearoa New Zealand, 2008a, p. 53). By 2009, the 'theological' sections had been removed from the MD Programme handbook, though one later appeared as an Appendix in the training manual for reviewers (Wright, Hannah, & Ward, 2013). It was understandable that the programme was widened to include both pressing concerns – registration and review -

but puzzling that the summative aspect of Certification was placed up front, before the regulations relating to the more positive formative Ministry Review. A number of reviewer training events were held, and the PCANZ website lists 44 reviewers whom ministers can utilise for a very reasonable cost, payable by the parish (Presbyterian Church of Aotearoa New Zealand, 2015).

What happens in a review?

Although the Handbook places the matter of a Certificate of Good Standing before the explanation of how to arrange a review, in practice the minister must have had a review in order to secure certification. The Presbytery may have reminded them that a review is due, or they may have kept track of the issue themselves; initial planning envisaged a review every second year, to tie in with a cycle of congregational reviews, but in 2010 the interval was changed to three years. The minister is able to select their own reviewer, from the list of those accredited; most use one from their own presbytery, to save the travel costs which are payable to a reviewer from further afield (Presbyterian Church of Aotearoa New Zealand, 2015). Reviewers themselves usually go outside the presbytery for their own review, and there may be other reasons for selecting a certain individual. Pacific Island parish ministers, for example, have access to Pasifika reviewers. There is even provision for selecting a reviewer not accredited by PCANZ, if they can be shown to have relevant experience; this could apply when a minister is in 'kindred service', e.g. in military chaplaincy. The page about selecting a reviewer includes the only reference to the important distinction between review formats, first introduced at the 2004 Assembly (PCANZ General Assembly Office, 2014; Presbyterian Church of Aotearoa New Zealand, 2004). It notes that ministry review is neither normative nor summative, and explains these. In a later paragraph, the category of formative review is mentioned but not defined; the only place an explanation is given is in the glossary at the back (PCANZ General Assembly Office, 2014). The reassurance that the review is not summative belies the fact that the certification process is exactly that.

Preparation for the review involves the reviewer and parish leaders exchanging pertinent information, such as the congregational mission statement, and meeting with the review panel to explain the process. A mentor is identified, usually the minister's own supervisor, to companion them through the process, though not necessarily by attending in person. The spouse is not automatically involved, nor are they excluded; the programme simply states they may be "included ... where appropriate" (PCANZ General Assembly Office, 2014, p. 9).. A police check and recent attendance at a risk management (ethics and boundaries) workshop is also verified. The MDR Handbook explains the framework for questions to be considered, describing eight categories as the template for the review (PCANZ General Assembly Office, 2014):

- Mission Capacity: Personal Character, Faith, Communication, and Interpersonal skills
- Mission Vision: Context, Vision, Change and Implementation.

These aspects are closely aligned with the eight dimensions of a Healthy Congregation that have undergirded the church's work with congregations as a whole since 2002: Outward Focus, Healthy Relationship with the wider church, Sense of Direction, Worship, Lively Faith, Sense of Community, Involving Leadership, and Newcomers/numerical growth (Wright et al., 2013). The most important exercise at this stage is a self-review, which usually takes the form of reflection on a series of questions provided by the reviewer, and canvassing responses to the eight aspects. These may include the following (*questions selected from 30 used in a 2011 review*):

- **Vision - Degree of Commitment:** Do you work with commitment and intentionality toward achieving the (group) Vision? Do you engage others to achieve the Vision? Please give an example of how you have done this.
- **Change - Implementing Change:** How have you made sure that planned changes are implemented and carried out so they are accepted by the parish? If changes have not been accepted by the parish, what else could you have done to assist people to accept this change?
- **Faith - Spiritual Growth:** To the best of your knowledge, do you show vibrant personal spiritual growth? Please give a reason for your answer.
- **Context - Handling Diversity:** How have you handled different kinds of diversity? What has worked and what are aspects you would want to do differently?
- **General:** What do you see as the greatest challenges/barriers in your Ministry? What would you regard as your most satisfying achievements over the past two years? What processes do you have in place for personal and professional support and nurture?

These headings and similar questions are found in the form for congregation respondents, which begins:

You have been requested by the Minister to take part in the Ministry Development Review. The purpose of this review is to provide a framework for your minister to

- (a) *review his/her achievements*
- (b) *discuss the feedback received with me, the Reviewer*
- (c) *identify opportunities for personal development planning*

This is an objective process designed to encourage the Minister and assist them in their professional growth and development. Please answer the following questions as honestly as you are able. The content of what all the Parish Reviewers say will be collated by me and will be the basis of the discussion with the Minister. While

the content of what you say will be reported on, the identity of who says what will remain confidential.

The reviewer gathers and analyses the responses to integrate learnings from the minister's self-assessment and the member respondents. There is provision for the reviewer to observe specific aspects of preaching or pastoral care if preliminary discussions indicate these to be "particularly challenging" (PCANZ General Assembly Office, 2014, p. 9). They prepare a draft report and suggested development goals, using the eight aspects as a template, and use this draft, often provided to the minister in advance, to guide "a conversation in which the minister has an opportunity to contribute to the final report" (Wright et al., 2013, p. 36). This collaborative approach is aimed at enhancing understanding and ownership of the developmental goals. The confidential report is given to the minister and a copy is lodged at PCANZ's Assembly Office for purposes of moderation and appeal; under normal circumstances the local or regional church leaders only see the document if the minister chooses to share it, which they usually do (P1, personal communication, June 26, 2014, and P3, personal communication October 3, 2014). Attestation that a review has been undertaken is provided to the Presbytery, and contributes to the minister's ability to gain a Certificate of Good Standing (PCANZ General Assembly Office, 2014). The parish is invoiced for the review and the cost is normally less than \$500.00.

The reviewer training makes much of the values of trust and confidentiality. They are encouraged to 'zero in' on one dimension of the competency framework as the best area for the minister to focus their current professional development (Wright et al., 2013). Reviewers are taught that their role is not primarily that of judging whether the minister is competent or not, but rather using their perceptions to help the minister identify developmental tasks that will be of benefit to their ministry (Wright et al., 2013). Although there is close liaison between the reviewers and the Presbyterian Church's Knox Centre for Ministry and Leadership, limited resources mean an early plan for the centre to follow up a review with individually-targeted ministry development training has not been implemented; ministers can access training from any of the many providers in the sector. Accountability for achievement of the agreed ministry development objectives principally lies with the minister, but it is expected that the goals will be revisited at the following review; one reviewer noted that the same concerns still emerge three years later (P3, personal communication October 3, 2014). Presbyterian parishes are expected to resource a minister's continuing ministry formation, but the expectation included in the Conditions of Service manual is "one week every two years", half the number of CMF days it was prior to the implementation of the MDP (General Assembly of PCANZ, 2006; 2014, p. 23).

When the nationally-agreed approach to Ministry Review was implemented in 2010, the reviewers found many ministers had never previously had a review, other than that encompassed by the Quinquennial Visitation. However the uptake has been high, 89% as of January 2015, with some ministers being now into their second three-yearly cycle. Reasons for this compliance, according to one reviewer, was the Assembly Executive Secretary's 2013 threat of sanction by removal from the ministry roll of ministers not 'in full standing', a status which depends on evidence of a recent review (P1, personal communication, June 26, 2014). The current Leadership Sub-Committee reports that the small number of ministers not presenting evidence of review are "warned and encouraged to book a review, but if no action is taken they will not be able to accept a Call and their name will be removed from the Marriage List" (P5, personal communication, July 2015). The interplay of summative and formative appraisal appears to be working.

Termination of a ministry role

Performance management in the commercial sector is often about ensuring compliance with the threat of termination (Luecke, 2006). The only specific sanctions mentioned in the Presbyterian review programme are the penalties for not having a timely review, but the reviewer can also take action if agreed goals have not been pursued over a three-year period; provisions include a conversation with the Presbytery Moderator or the Convenor of the relevant (ministry or HR) committee (P5, personal communication, July 4, 2015). However the training manual states that as well as monitoring developmental needs, reviewers need to be "alert for problems"; examples given are dissonance of views between parish and people, lack of insight into values or behaviour, or real mistakes made by ministers in managing change (Wright et al., 2013, p. 63). Some of these could be dealt with recommending a Congregational Review, or a referring the minister to a specific helping professional, such as a marriage counsellor. When faced with serious concerns, a reviewer could initiate discussion with the Parish Clerk around the various options in the Book of Order for dealing with 1) conduct unbecoming of a minister, 2) physical or mental incapacity, 3) inadequacy including an unacceptably low standard of performance and/or 4) serious incompatibility between minister and congregation (Presbyterian Church of Aotearoa New Zealand, 2014a, chapter 10). In all these cases the minister would be informed that this action was being taken (Wright et al., 2013). A minister can choose to resign as the outcome of an unsatisfactory review; this does not affect their ability to accept a call to another charge (Presbyterian Church of Aotearoa New Zealand, 2014a). In some cases the Presbytery may consult with the congregation and decline to accept the resignation, instead offering mediation or other means of remedying tensions that led to the decision (P5, personal communication, July 4, 2015).

Severe and persisting ministry personnel concerns presenting in the wider context are dealt with in PCANZ's discipline regulations regarding "the ends of ministry not being served" (Presbyterian Church of Aotearoa New Zealand, 2014a, p. 48). A range of problems that may emerge during a review are listed for reviewers (Wright et al., 2013):

- ill-prepared services and inappropriate preaching
- administrative tasks left unattended
- people feeling they can never approach the minister with serious concerns
- frequent outbursts of temper by minister
- inappropriate relationships.

Reviewers are advised they should "not fail to act" on signs that the ends of ministry are not being served (Wright et al., 2013, p. 63). The category of 'conduct unbecoming of a minister' is dealt with by national officers implementing special regulations, and is intended to cover behaviour, such as sexual misconduct or theft, that, if proven, could result in the minister losing their job (P5, personal communication, July 4, 2015). Other situations of "inability of the minister" are dealt with more regionally, by a commission of the Pastoral Resolutions Committee which exists in each of the five Presbyteries (P5, personal communication, July 4, 2015). Church discipline in the PCANZ today is more concerned for restoration than punishment; proceedings are intended to follow biblical principles of gentleness, impartiality and faithfulness, as well as ethical standards of natural justice and confidentiality (Presbyterian Church of Aotearoa New Zealand, 2014a, chapter 15). Commissioners are urged to consider alternatives for alleviating difficulties; professional mediation at the church's expense is often utilised to resolve points of difference without resort to judicial proceedings (P5, personal communication, July 4, 2015). However if the conclusion is reached that the only option is to terminate the ministry appointment, the Presbytery, as the regional college of ordained leaders, has power to do so; an "unacceptably-low standard of performance" is named as one of the grounds for termination (Presbyterian Church of Aotearoa New Zealand, 2014a, p. 92). The decision is made collaboratively and with discretion.

4.2.2 The New Zealand Baptist Church context

Congregations in the diverse New Zealand Baptist 'family of churches' often look back to the pre-Reformation Anabaptists (who espoused Believer's Baptism) for their roots, but in fact they are historically descendants of the separatist English Baptists of the seventeenth century. Settlers holding Baptist convictions arrived in New Zealand from the 1840's, and the first Baptist churches were formed in the middle of that century (Sutherland, 2011). The Baptist Union of New Zealand currently has 241 member churches with weekly attendance averaging 26,000 adults and 10,000 teens and children

(Baptist Churches of New Zealand, 2015a). These congregations represent a network of mutually-supportive congregations varying greatly in style, and the Baptists who make them up come from many different ethnicities, cultures, economic groupings, and ecclesiological backgrounds (Baptist Churches of New Zealand, 2014a; Bolitho, 1993). There is little in the way of agreed doctrine or policy; the four distinctive beliefs listed on the Union website bear witness to Baptists' "historic repugnance to creeds" (Baptist Churches of New Zealand, 2015c; Sutherland, 2011, p. 122). Around 350 pastors were listed as sole or senior pastors or other registered/accredited ministers of the NZ Baptist movement in 2014 (Baptist Churches of New Zealand, 2015a).

Polity and practice with regard to evaluation of ministry in the New Zealand Baptist churches has some similarities with the way reviews operate in Presbyterian churches. Although the Kiwi Baptist heritage also dates back four centuries to the Reformation, and governance today is often a collaborative partnership of elders and pastors, there are some critical historical differences between Presbyterian and Baptist churches. The Presbyterian Church has a countrywide identity and a national governance structure, whereby policy made at Assembly level applies to all member ministers and congregations. Baptist churches in New Zealand have an informal national structure that has no official authority over individual pastors or congregations; all collaboration is voluntary (Sutherland, 2011; Winslade, 2009). Some churches are actively involved and committed to the work of the Baptist Union, supporting the NZ Baptist Missionary Society (Tranzsend), sending students to Carey Baptist College, and participating in the annual Gathering (assembly) and regional networks. Others keep the denomination at arm's length, preferring to support non-denominational missions and seminaries, and playing little part in the collaborative decision-making of the Baptist family. Levies to the Baptist Union are voluntary and a number of churches do not contribute (Baptist Churches of New Zealand, 2015a). "Baptists dislike having anyone speak on their behalf", wrote Bolitho in 'Meet the Baptists' in 1993, citing also a leader's comment that "opinions of Baptists are exceedingly diverse, we are by definition dissenters." (Bolitho, 1993, p. 64). This independent streak also impacts issues of accountability and review. A significant factor in determining praxis is the diversity in pastoral leadership.

For much of the twentieth century, Baptist College (now Carey) trained a "select band of single men for a lifetime vocation", producing sole-charge ministers conservative in style (Bolitho, 1993, p. 11). By the 1990's, huge changes had taken place, with older married or single men and women bringing a multitude of past career experiences to team ministries in theologically-diverse churches, many of which had been reshaped by the 'charismatic' (Pentecostal) renewal of the seventies and eighties. College Principal Brian

Smith said in a 1993 interview, “we need them all, including the oddballs...who have the cutting edge to do things others can’t do.” There was a central evangelical core but more variety round the edges, and in fact a catchphrase reflecting this ethos – “committed at the core, and open at the edges” - was coined by one Auckland church (Ponsonby Baptist Church, 2015). Pastoral leadership was no longer seen as a fulltime lifelong vocation, and recognised ministries broadened to include chaplaincies, amorangi (Maori clergy) and business entrepreneurs in developing nations. The historic category of ‘ordained’ had been amended to the more functional ‘accreditation’ in the sixties, and in 1986 its scope was widened to include serving ministers with leadership experience but no theological qualification (Editor, 1986, in Baptist Research and Historical Society, 2014, p. 7862).

The Baptist Union did not offer this researcher access to an archive of policy documents and Assembly discussions comparable with that available from the PCANZ, but the national magazine, the NZ Baptist, has been digitised, and provided an abundant record of trends and debates in ministry matters. Sutherland, who oversees this archive spanning 135 years, describes it as a vehicle of Baptist identity and “a mirror to the denomination” (Sutherland, 2007, p. 23). It certainly provides a useful window into changing emphases in church life. A search for keywords like appraisal, performance, review and accountability revealed occasional use of these notions of evaluation in reference to missionary candidates, youth work, congregations and services. Appraisal was not used of individual ministers until 1981, when the National Secretary spoke of the danger of treating ministers like horses, who may be given lots of rope at the beginning but are then reined in with a thud! (Edgar, 1981, cited in Baptist Research and Historical Society, 2014, p. 7008). Instead, he said, there is a need for “a sensitive and critical appraisal of each other’s ministry” (Edgar, 1981, cited in Baptist Research and Historical Society, 2014, p. 7008). Pastors in 1988 were advised to conduct objective self-appraisals, because of the high expectations associated with their calling (Crozier, 1988, in Baptist Research and Historical Society, 2014, p. 8057). In 1989, a Baptist church reported a positive experience with a church review recommended by the regional superintendent and conducted by a team sourced from beyond the congregation (Milford Baptist report, 1989, in Baptist Research and Historical Society, 2014, p. 8311). The church had concerns that this would be a management exercise devoid of spirituality, but their fears proved groundless. They acknowledged that the Baptist “system of independent and autonomous churches often isolates us from outside scrutiny...isolation is not always healthy or helpful” (Milford Baptist report, 1989, in Baptist Research and Historical Society, 2014, p. 8311). A paradigm shift towards management thinking, though not devoid of spirituality, is discernible through the nineties, with advice being given about employee rights for administrators and other paid

staff, and warnings being sounded about the move to pastor contracts endangering the legal status of call (Baptist Research and Historical Society, 2014, 1990-2011).

The year 2000 was pivotal, beginning with the visit by national Executive Secretary Ian Brown to the American Baptist Churches of the West in California, USA (Sutherland, 2011). The visit so impressed Brown and his team that they returned to New Zealand fired up with the notion of 'Growing Healthy Churches,' a phrase which became the catch cry of the NZ Baptist movement for over a decade, and is still referred to in official documents (Baptist Churches of New Zealand, 2014b). Although this took place at the same time as the Presbyterian Church was implementing its 8-point Healthy Congregations paradigm, the Baptist vision seems to have been more about the 'growing' than the 'health'. It was a vigorous restatement of the goal of Baptists everywhere, helping people "find saving faith through personal connection with Jesus Christ" (Winslade, 2009, p. 6). Proposals to refocus national endeavours on the core task of growing healthy churches were developed and adopted in 2000, and in 2001 Paul Borden and John Kaiser came from North America to resource this new emphasis on leadership, introducing diagnostic tools that could equip team-led ministries (McNee, 2000, in Baptist Research and Historical Society, 2014, p. 2188; Kaiser, 2006; Sutherland, 2011). Two new roles were established to replace the dated layers of Baptist leadership – a National Consultancy which was readily assigned to a capable pastor, Lindsay Jones, and a National Leader, which was more problematic to the congregations (Baptist Research and Historical Society, 2014, 1990 - 2011; Sutherland, 2011). After some debate and an interim appointment, Brian Winslade took up the role of practitioner-leader at the November 2001 Assembly, continuing as pastor of a large Auckland church while providing vision and leadership to the movement as a whole (Winslade, 2001, in Baptist Research and Historical Society, 2014, p. 2393).

The appointment of Winslade and Jones helped shape a move to more intentional evaluation of leadership and mission in the church. In the New Zealand Baptist in March 2002, Winslade's Leader's Column reflected on the ERO (Education Review Office) process in schools and asked how churches would do under the same kind of spotlight. Claiming that "pastoral ministry is one of the most unaccountable careers in our society," he noted the ubiquity of performance review in commerce and industry, and suggested churches consider the benefits of appraisal (Winslade, 2002, in Baptist Research and Historical Society, 2014, p. 2531). He notes that not just the ministers, but all church leaders, need their performance reviewed (Winslade, 2002, in Baptist Research and Historical Society, 2014, p. 2531). Winslade introduced the new process available to Baptist churches, the consultancy track, a voluntary assessment weekend where a team led by Lindsay Jones will "come alongside a church and help it look at itself" (Winslade,

2002, in Baptist Research and Historical Society, 2014, p. 2531). Anticipating objections that the church is not a business, Winslade made a case that churches are indeed in business – the business of making disciples, assigned to the church by the business owner who one day will hold his workers accountable for their performance (Winslade, 2002, in Baptist Research and Historical Society, 2014, p. 2531). Later in 2002, an insightful rebuttal by philosophy lecturer Murray Hofmans-Sheard pointed out dangers in a business model and CEO mentality. Suggesting that the tools of business are blind to many of the church's tasks, he said he agreed with reviews but would rather have an "internal hui" than a "Baptist ERO" (Hofmans-Sheard, 2002, in Baptist Research and Historical Society, 2014, p. 2567).

From 2001 onwards, the NZ Baptist included reports and promotion of National Consultant Lindsay Jones' role in coaching pastors and working with churches, as the context changed from 'one man band' to the staff-led model propounded by the Californian consultants. This model, which parallels with school boards, is said to ensure the right things are done by the right people in the right places; the pastor manages the staff team, holding them accountable for ministry outcomes, while he/she is held accountable by elders who are in turn accountable to the church AGM (Jones, 2002, in Baptist Research and Historical Society, 2014, p. 2649; Holmes, 2006). This model – whose name evolved into the present 'Ministry Led Model' to avoid inappropriately-professional overtones - brings together authority, responsibility and accountability (Holmes, 2006; Sutherland, 2011). In June 2003, readers learn of a "pastoral survey tool" being introduced to the Consultancy assessment weekends, as a mechanism for addressing leader health (Jones, 2003, in Baptist Research and Historical Society, 2014, p. 2863). This 360 degree feedback form, developed by Jones and pastor Peter Mihaere, who was experienced in HR, measured not just traditional clergy qualities of relational skill and preaching ability, but also vision casting, people management skills and awareness of today's culture (Baptist Union of New Zealand, 2004). Performance review had arrived in the Baptist church, just as it had to the Presbyterians around the same time.

Feedback to the National Leader about findings from this tool, and the parallel Church Health Survey, led to his writing in 2005 about unbearable conflicting expectations on pastors, and leadership systems that can be obstructive; he said "pastors need to know they are loved and supported" (Winslade, 2005, in Baptist Research and Historical Society, 2014, p. 3494). Rob Bellingham, a national president, had also written about churches being hard taskmasters, and ministry being a lonely task (Bellingham, 2003, in Baptist Research and Historical Society, 2014, p. 2884). It seems that a number of pastors resigned following assessment weekends, possibly a long-needed purging, but

for whatever reason, use of the survey tools declined (Jones, 2007, in Baptist Research and Historical Society, 2014, p. 4006, vol 123/10). In 2015, few churches access the Pastors Review Survey, now an online tool managed by the Baptist Union in conjunction with HRM company Kenexa, and costing \$295.00 (Baptist Churches of New Zealand, 2014b). That does not mean reviews are not taking place. Many churches utilise members with commercial or school board experience to manage an in-house review, and others contract an external facilitator. The Northern Baptist Association has a kit of resources which includes theoretical assumptions, general procedures and specific templates for annual review (Northern Baptist Association of Churches, 2013).

The 2014 Baptist Assembly introduced changes to Pastor Registration and the crafting of an appropriate Ministry Development Plan; this ongoing project is a collaboration between Carey Baptist College and the Baptist Union (Carey Baptist College, 2014). Registration is a normative process, on a two yearly cycle, which adds the recognition of the Baptist Union to the call of a local church, and involves equipping, relating, and accountability (Baptist Churches of New Zealand, 2015b). Eligible leaders (pastors and others with a significant leadership role) need to comply with three criteria:

1. A spiritual accountability (pastoral supervision) arrangement of some kind.
2. Connection with the Baptist movement through participation in pastors' clusters, annual gatherings and Baptist-led events like Carey Baptist College conferences.
3. An approved Applied Practice plan such as the recommended Carey College 'lifelong learning' options available in 14 ministry development areas. These units follow an action-reflection model and are guided by Carey staff as well as a coach identified by the pastor. There is a self-guided "Reflective Practice" option but there are strict conditions, and so far 80% of ministers applying for re-registration under the new system have opted for the Carey programme (Baptist Churches of New Zealand, 2015b).

Drake, charged with implementing Lifelong Learning at Carey, notes these developments are a step up from what was previously expected; traditionally the ministry development goals were easily achievable, involving for example, a commitment to read three books and attend a conference. The plans sometimes had little connection with the daily work of ministry. "The bar is being pushed up a bit", says Drake, "but it should still be doable by pastors in small churches" (Drake, personal communication, February 2015) Another way the bar is being raised is that pastors who are not registered (or accredited under an earlier regulation) are not added to the Department of Internal affairs list of approved Baptist marriage celebrants. It is of interest that an annual review is not explicitly included in the requirements for registration, as it is in PCANZ. However the

definitions of eligibility for registration, which have been widened to include Baptist leaders not currently in a pastorate, but who serve the movement in significant ways, does obliquely mention that a candidate for registration should have:

- A 'terms of call' agreement, employment agreement, or volunteer agreement (as applicable) regardless of whether they work for a church or a trust.
- A clearly defined role description together with strong lines of accountability, including a ministry review process (Baptist Churches of New Zealand, 2015b)

What happens in a review?

The Baptist practice of review is varied, even idiosyncratic, ranging from a 'fireside chat' with one or two elders, through to a full 360 assessment with Likert scales and member feedback. The process is not prescribed by the Baptist Union, and may never be, but a consideration of procedures and parameters in the two available review formats - the online Baptist Union one and the Northern Association kit - may give a sense of what a pastor can expect.

There are three main differences between the two tools.

1. Evaluation: The online Baptist Union review, which is identical to the Pastor's Survey tool of 2003, makes abundant use of Likert scales in evaluating a pastor's performance. The Northern one offers questions around which conversations with a reviewer can take place.
2. Competency: The parameters are different, with the Union one being framed around competencies that bear some resemblance to the Presbyterian 'aspects of development'. The Northern one makes more use of indigenous factors like the current job description, church mission statement, and previously agreed ministry objectives.
3. Anonymity: the Baptist Union pathway keeps feedback anonymous, individual responses and comments are not revealed to the pastor, while the Northern one derides anonymity in favour of thoughtful openness, since "both compliments and criticisms need to be weighed with the person making them." (Northern Baptist Association of Churches, 2013, p. 5)

The Baptist Union survey is introduced as a means of evaluating the pastor's work, by focusing on 61 key behaviours regarded as critical to effective ministry of a pastor in a Baptist Church. Participants - who are to be people the pastor interacts with most regularly - are asked to select a rating on an eight-point Likert scale, judging the named behaviour to be always, sometimes or never like him or her, "most of the time, on most jobs, and with most people" (Baptist Union of New Zealand, 2004, p. 2). A 'don't know' option is offered, and space is provided for relevant comments (see Table 5).

RESPONSE SCALE					
Never like him/her	Seldom like him/her	Sometimes like him/her	Normally like him/her	Almost always like him/her	Exactly like him/her
1	2	3 4	5 6	7	8
N= Don't Know					
5.2 Initiates and responds to change with sensitivity and openness					

**Table 5: Example of question and response scale
in Baptist Union 2004 Survey Tool.**

The survey is said to "provide pastors with the opportunity to reflect on aspects of their role, in order to improve their ministry effectiveness" (Baptist Union of New Zealand, 2004, p. 2). Behaviours appraised (though that word is never used) are leadership, administration, preaching/teaching, worship, collaboration, team work, pastoral care, sense of community, communication and personal effectiveness. More discursive reflections are then invited, identifying "behaviours that contribute to effectiveness", and "changes the pastor could make to improve their effectiveness" (Baptist Union of New Zealand, 2004, p. 9). Participants are assured of confidentiality and advised to avoid comments or references that might identify them. The pastor receives a consolidated print-out of the comments made by all respondents, and an overview is presented in person by a member of the Baptist Union's team in their area.

The Northern Association kit begins by stating that the purpose of a pastor review is ministry development and enhancement (Northern Baptist Association of Churches, 2013). Its intended result is that pastor and people are strengthened, encouraged and better equipped to carry out their God-given tasks. It is meant to be "an affirming process, where strengths are praised, and strategies put in place to address any evident weaknesses" (Northern Baptist Association of Churches, 2013, p. 2). The introductory section reminds churches contemplating a pastor review that it must revolve around the people of God as they worship, evangelise, and disciple, and their agreed mission and ministry goals. If there is no statement of the church's mission and purpose, and a clear pastor job description relating to it, the review proposal should be deferred in favour of prayerfully attending to those tasks. If a review does go ahead, the recommendation is that it comprise five people selected for a balance of leaders and members, perhaps including someone with workplace review experience, and ideally utilising a Baptist from beyond the congregation who convenes the review. The pastor's spouse is not normally involved in the review meetings.

The introduction contains some warnings. Congregational questionnaires are discouraged because they are difficult to relate to a job description and can raise irrelevant issues (Northern Baptist Association of Churches, 2013). The Association further asserts that “it is unfair for any ministry review to be casually based on general ‘feelings’ expressed by members of the congregation about how they perceive the pastor’s ministry. It is said to “open the door for unfocused comment on all kinds of general concerns that may not relate to the task the church has called the pastor to perform” (Northern Baptist Association of Churches, 2013, p. 3f). The reviewers are told the process will take time, and some days may be needed for reflection, prayer and writing up documentation. The need for sensitivity and a pastoral attitude to one another is highlighted, with the hope that deeper relationships will emerge (Northern Baptist Association of Churches, 2013).

Sample questions are offered for a number of scenarios, e.g. new pastor after three months, senior or sole pastor subject to annual review, or reflection on the effectiveness or otherwise of a review. Self-assessment questions for the pastor include:

- How have you performed in completing the goals and objectives set at the last review? What has been achieved and what hasn’t? What factors have affected these outcomes?
- How does the church and its structures help / hinder your ministry performance?
- What plans for development do you have? What training do you require or you feel is desirable? (Northern Baptist Association of Churches, 2013, pp. 13-14).

The open questions for the reviewers include opportunity to affirm strengths and identify concerns, and the focus is on changes that can realistically be made. Written responses by the pastor and other participants are encouraged; this maintains objectivity, clarifies meaning and helps overcome reluctance to express a negative opinion. Examples of these questions are:

- How has the pastor performed in completing the goals and objectives set at the last review? What has been achieved and what hasn’t? What factors have affected these outcomes?
- Describe any deficiencies in the leadership group or congregation that affect / have affected the Pastor’s performance and need to be noted.
- In what areas might there be a need for external training or development? (Northern Baptist Association of Churches, 2013, pp. 10-12).

The goal of both Baptist review formats is seen to be a series of agreed ministry goals reported to the leadership team and also to the congregation. Police checks are not explicitly mentioned, nor are terms and conditions which in Baptist churches are often locally determined. The Baptist Union has no way of knowing when and how its member churches and pastors are formally reviewed, and these formats represent only one end of a wide spectrum of evaluation practices.

Termination of a ministry call

Like the Presbyterian review programme, reviews in the Baptist church are meant to be a positive experience, aimed at enhancing a pastor's strengths and managing any evident weaknesses. However, in the local governance context of Baptist churches, where the power to appoint and dismiss the pastor lies with the members meeting, the review can be, and often is, used as a mechanism for recommending dismissal. This is clearly provided for in the model constitutions in the Baptist Handbook, which state that "if the review report is unsatisfactory it may mean that the Pastor's appointment will conclude" (Baptist Churches of New Zealand, 2014b, Appendix 3-A, 11). Pastors are reminded that their call is not an employment relationship and that its endurance is a matter of good relationship between pastor and people. Two specific grounds for termination are given:

1. Beliefs: if a pastor's beliefs and values change in such a way as to become "inconsistent with the stated beliefs of the church, "the congregation may terminate the call (Baptist Churches of New Zealand, 2014b, Appendix 3-A. 3.13.2)
2. Behaviour: if a pastor's conduct of every aspect of their "private, family and social life, together with every aspect of his or her ministry" conflicts with the "standing and requirements of the position," the congregation may terminate the call. (Baptist Churches of New Zealand, 2014b, Appendix 3-A. 3.14.3)

These are very wide bounds, and where church elders and members have limited understanding of natural justice and professional ethics, could lead to unsafe decisions. The fact that the agreement is terms of call rather than an employment contract protects the church from litigation under NZ law. For this reason, the guidelines and the model terms of call remind the church members to treat the pastor with fairness and dignity upon the conclusion of the pastorate. Unless a serious breach is involved, three months' notice should be given, and any dispute arising from the dismissal must be referred to an independent party for resolution. The model constitution documents state that a members' meeting requires a 25% quorum of members and that a special meeting to terminate the pastorate requires 50% agreement (Baptist Churches of New Zealand, 2014b). Conceivably under this model, a pastor could be dismissed by one-eighth of the

voting members (a constituency which is often much smaller than the weekly attendees). The pastor of course can terminate the call themselves if they feel the review has been unsatisfactory, but no mention is made of mediation when this has been the case.

In explanatory guidelines to the model Terms of Call, the authors take a pastoral perspective: "The termination of a pastorate can be an extremely difficult and stressful time for both Pastor and Church. Processes that involve the need to undertake any enquiry or investigation through a series of members' meetings have always increased the difficulty and stress" (Baptist Churches of New Zealand, 2014b, p. 182). The guidelines recommend that the elders/oversight represent the church members in all matters relating to the Call, having discretion to bring before the Church only the bare bones of matters requiring a decision (Baptist Churches of New Zealand, 2014b). Ideally, they say, the members' power to suspend or dismiss the Pastor should be delegated to these representatives; this will confine the intimate details of the pastor's life and work to a small group of wise leaders. Constitutionally, the church is said to not have to give reasons for termination of a call, but the model Terms of Call contradict this by stating that both pastor and church leaders are "always entitled to an explanation of the other's concerns, including the specific details of any allegations made" (Baptist Churches of New Zealand, 2014b, Appendix 3-A, 3.14.6). The authors also remind churches of the need to document decisions made and to access legal advice when appropriate.

Chapter Five will present the interview findings, shaped by the constructs identified in the Grounded Theory Methodology: Review as a realistic and hopeful Conversation, with key dimensions of Formation, Collaboration, Imagination and Vocation.

5. Interview Findings

- *This chapter presents the main themes emerging from the data in a mixture of verbatim quotes and indirect summaries. They are connected with the project title *Realistic and Hopeful*, reflecting how reviews can function as a blend of current reality and future aspiration, and provide clergy with encouragement, critique and recommendations for development.*
- *The first section looks at the overall experiences of review conversations, and the endorsements and concerns expressed by Baptist and Presbyterian ministers.*
- *The second part explains how the participants connected review with their spiritual and psychological Formation and personal growth.*
- *In the third segment, Collaboration between elders and ministers in conducting and responding to a review is described*
- *The fourth section looks at the role of the pastor's Imagination in leading vision and managing change in the church, and how a review contributes to that.*
- *Fifthly, consideration is given to the role of the review in shaping a minister's sense of Vocation and in the wider church's strategies to recruit and retain valuable human talent.*

The fifteen interviews for the Clergy Review project were aimed at gathering qualitative data on ministers' experience of their own, and others', clergy reviews. The research question specified that it was the "salient features" of clergy review that were sought, and the Grounded Theory Methodology was applied with a view to building a useful theory that could augment the existing body of knowledge in Human Resource Management. The data analysis revealed five constructs that can be described as salient features, and the interview data is presented around those themes. Verbatim quotes are presented as bullet points rather than quote marks; any text in italics within the bulleted paragraph is researcher wording – either verbatim questions or interpolations to make the meaning clear. All names used are pseudonyms and identifying information has been removed or disguised. Seven interviews were with Baptists, and eight with Presbyterians.

5.1 Clergy Review Conversations

A conversation is a feature of human relationship, and involves two viewpoints being shared respectfully with a view to mutual understanding and shared goals. Conversations may be mundane, but some have the power to change lives, and the review conversations described here, as well as the research interviews themselves, did have that potential. All participants had experienced more than one review. Presbyterians had all had one or two of the three-yearly Ministry Development reviews in the last five years, and had contributed to Quinquennial Visitations (parish review including clergy questions) at various intervals prior to that. Baptists had experienced a formal review between two and nine times, but the intervals varied widely; one had only had two reviews in 22 years of ministry.

Many participants expressed positive opinions about the review process. Both Baptists and Presbyterians used expressions like useful, positive, encouraging, constructive and affirming. They talked about the opportunity to “think and reflect”, and saw the purpose of the review as providing clear feedback to clarify directions to pursue and “rethink the way you lead.” They also expressed some specific concerns.

5.1.1 Presbyterian Experiences of Review:

The Presbyterian ministers were all reflecting on similar experiences, because their reviews had followed the same template. Although some Presbyterians spoke about the process as normative –“it’s about accepting the discipline of the church” and “I’m glad it’s been attended to nationally as an expectation” - others emphasised the opportunity for personal growth. Ethan said “I thought, I want to use this for myself, rather than just be vetted.” Jacob explained how he found the experience of being asked probing questions prompted deeper self-reflection:

- Someone who had been through (*a review*) said “This is all to help you become a better minister. There is no fail in this. The only failure is not do it.” After doing it I felt, yes there’s absolute value in it, being able to self-reflect on where you are and having someone who didn’t know me well ask questions and be the devil’s advocate, which I found very good. That opportunity to think and reflect was a very useful exercise.... you reflect a whole lot more than when it was quinquennial, because this is a longer process... about the person and his ministry... asking them without me being there reinforced... how I was going.
So it gave you more confidence?
Yeah, to say, ok, we are on the right track (Jacob).

Micah and Reuben, reviewers themselves, described feedback from their reviewees who reported receiving affirmation and encouragement they rarely experienced in their ministry life:

- It was intended as an affirmative process....one person I reviewed said at the end, “This has been the most encouraging experience of ministry. The first time somebody has ever, in any detail, said anything positive about my ministry in 30 years” (Micah).
- The way (*the reviewer*) built up trust with the group provided some very clear feedback. It was a very affirming process....With the right person preparing the ground, there’s that clear reading of the context, and being able to speak wisely into it....it’s probably the most supportive thing the church has done for me in five or six years (Reuben).

Some participants were Presbytery leaders who had participated in the genesis of the national review programme. They expressed wholehearted support for having “a long hard think” about ministry goals, and for bringing issues to light. Many spoke about the formal report that the Presbyterian Ministry Development reviewers produce, in consultation with the reviewee, to document the findings and recommendations. Most ministers felt their report was a helpful summary and provided directions to pursue, and in some cases, behavioural changes to make. Several noted how the reviewer had

helpfully triaged and contextualised comments that seemed at odds with other feedback; the advantage of gathering data from multiple sources means there is this opportunity to test comments against one another, and to moderate feedback, which is often subjective.

Many had shared all or some of that report with congregational leaders, although that is a matter of choice for the minister.

5.1.2 *Presbyterian Concerns*

Some Presbyterians, even those who spoke positively, did express concerns. Many noted the complex language used in the review documents, referring to horrendous or impossible questions, verbosity, and language that flummoxed members of the panel. One participant who is also a reviewer has adapted the questions, although that was tricky because he still had to cover all the competencies. Another critiqued the review paperwork's use of scriptural 'proof texts', perhaps intended as theological rationale to counter criticisms that the church is taking on secular business models:

- The use of the scriptures around the questions drives me nuts because it's trying to make it look legitimate, and there's legitimacy in it for its own right. But the idea of putting a little scripture alongside ...drives me spare.
It is clunky now that you mention it, I wonder whether it was ...
....for people who can't really breathe if someone hasn't offered a proof text....I believe that to put abbreviated little bits of passage against something is really dodgy theologically. I mean, I think there should be some theological statements about why we do this would be fine if it was really sharp theological interpretation, but the scriptures without interpretation are not how we work as a church...
That's a very good point (Levi).

Some participants affirmed the skills of the review personnel, and particularly appreciated the fact that some who are Pasifika bring familiarity with that context, but others reported problems with reviewers. Ethan mentioned, from his Presbytery, good people who trained but have never been asked to do a review, and other reviewers who were trained that he did not think were competent –“Who chose those guys?...one in particular can barely look after himself.” At Micah's second review, he felt he was being lectured, was hardly able to “get a word in edgeways”, and that a serious issue was brushed aside. The findings were interpreted through the lens of the reviewer's assumptions and style of ministry, and Micah's supervisor responded that the report did not accurately reflect who Micah is. Zara reported waiting months to get the report, and a year to get the Certificate of Good Standing, which would have been a real issue if she had been wanting to change parishes.

Reviewee responses which expressed concerns about adequate denominational follow-up to the reviews are presented below under the construct “Vocation”, because they relate to recruitment and retention.

5.1.3 Baptist Experiences of Review:

The Baptists had a more mixed experience, because their reviews were usually undertaken by a group of local elders; if an outside facilitator was involved, they didn't follow a shared template. Many reviews incorporated congregational feedback but some were contained within the eldership. Samuel had asked for "review-based accountability" when appointed to the parish, so has systematic monthly evaluations from elders, as well as more comprehensive annual reviews, with multiple Likert scales. Obed commended a more relational emphasis: "I've steered away from calling it a performance review....we've tried to make it more pastoral, 'How are you going? How can we help?'"

Positive experiences often included an outside facilitator, and the only participant who has experienced the Baptist-recommended Kenexa review tool appreciated the input from a denominational leader:

- I think (*the Baptist Union review*) works fairly well,...the scales didn't have the flaws of half-and-half...and somebody from the Baptist Union came and talked it through with us...one of the reflections from them was that the eldership's view of me was a lot closer to my self-reporting than the congregation (Caleb).

Some mentioned their preference that the elders speak with one voice in a review document. They didn't want eight different responses, they wanted the elder feedback collated into one written summary, a collective assessment which would guide present responses and future planning. Those pastors whose reports did include individuals' comments could often identify the writers, and one reported a dramatic incident with hostile feedback that had been shared with him:

- The elder who coordinated (*the review process*) fed back to the elders a one page summary. But the actual survey results and all the comments, they (*destroyed*) in front of all the elders....they were slightly traumatised by the ugly things that were in there....one said I was only a pastor for the money! (Caleb).

5.1.4 Baptist Concerns:

Concerns were expressed, especially by participants who had worked in a corporate environment or in the social sector, that many Baptist pastors are not reviewed regularly. They saw this intermittence, and churches' lack of experience with the process, as a factor in reviews that went horribly wrong, and in some cases precipitated a resignation. Some described feeling ambushed by questions or feedback they had not expected to be included, although in one case that was smartly countered by the pastor's clear understanding of the boundaries of the elders' governance role. Noah's disastrous experience of an in-house review was tainted by poor process and a lack of commitment:

- I wanted it to be a written report...this (*reviewing elder*) is more than capable of doing that, they've got (*a management background*) and in theory should know HR inside and outside. It was very chaotic. They lost my self-assessment review ... he wanted to tick it off, so he made a bad call and decided to wing it....(*all I got was a verbal*) regurgitation of comments (*from a past survey*) ...they just don't have a

framework....I let him have it with both barrels.....I'd been in the role for (15+) years and this was my first performance review. He didn't just get my frustration, he got my sense of disappointment that it's taken all this time to get here and this is it....elders struggle to separate 'how's the pastor doing' from 'how's the church doing' and the interrelationship between those two....there was no adequate formal performance review bucket to put the 'me' into, it stayed as ... part of a (wider) conversation that looked at trends in our church (Noah).

On the other hand, there was a concern that one Baptist review was not robust enough. In Deborah's second review, she felt ministry was going well, but hoped the review might identify ways she could make improvements:

- I didn't want to be criticised so much as work out where I need to grow in my ministry.... It was lovely, but just this bland cherry pie... (*It*) could have more useful to me personally....more pointed, and more regular, and the fact they were both driven by me (Deborah).

Deborah also reflected on the wider Baptist picture:

- Some of my (*pastor*) friends have had terrible reviews, and been devastated by these reviews. I sensed ... it was been more about the person giving the review.... one that wasn't very helpful was.... in a church recognised as one of the pastor-killing churches. Theirs were negative....and mine was too nice....overall, I don't think reviews are done well in our movement (Deborah).

The interviews revealed that the clergy review conversations have life-changing potential, for better or worse. Ministers' self-awareness and emotional health feeds into the experience.

5.2 Formation

The theme of individual growth and responsibility was labelled Formation to include the spiritual dimension integral to a minister's faith and work. Personal growth in spiritual, intellectual, social and emotional dimensions enhances awareness of, and responsiveness to, God, self and others, and shapes a leader's performance. Probing questions around competencies, detailed feedback from elders and members, and the self-reflection entailed in a review process were all factors that fed into a minister's awareness of how they were going and where they might profitably invest in personal growth and targeted training. Themes relevant to formation that the participants reported from their review experiences are spirituality, self-awareness, stress, study and supervision.

5.2.1 *Spirituality*

The commitment to a Christian spirituality and practices that enhance awareness of God and others is a key ingredient in pastoral ministry, and is assessed carefully by denominations when selecting candidates for leadership training. Participants in this 2015 study were all practising Christians whose everyday life includes worship, prayer, Bible reading and other spiritual disciplines, practised individually as well as in the context of leading the faith community. These factors were ‘taken as read’ in the interviews. Two described attending Spiritual Direction, with a trained professional who accompanies a person on the spiritual journey, and helps them listen, reflect, pray and share their gifts authentically with others. Many of the pastors spoke about hearing the voice of God, seeing the Spirit operating, honouring Biblical principles and serving God’s purposes. The vows made in the ordination/commissioning services mean the pastors are keenly aware that their integrity, decisions and family life are subject to the scrutiny of the church; Caleb probably spoke for them all when he said:

- You need to build your own character and model Christian living (Caleb).

5.2.2 *Self-Awareness*

The theme of taking responsibility for one’s own awareness, self-care and vocational development was a major focus in the interviews, as pastors reflected on their ministry journey, and on the influence of a review on their performance. Many spoke of understanding their own temperament, preferences, strengths and frailties:

- I’m a self-reflective. I’m not full of myself,I’ve moved beyond the youthful need to succeed.... now I’d rather work from the reality of something to own my own limitations (Noah).

Experience in ministry is accompanied by a growing sense of one’s own unique gifts and qualities. Micah noticed, from reviews he had led, that two older ministers were much more “comfortable in their own skin” than younger ones. Several described how they hoped the review would help them in that process, rather than just vetting them:

- I didn’t want to be criticised, as much as work out where I needed to grow in my ministryIn my (*profile*) I have none of the strategic strengths. So I’ve always been really careful to try to be strategic, to read strategic books, to do strategic planning. I recognise I’m more a day-by-day person (Deborah).

Insights into their own temperament and frailties can lead to ministers being able to set clearer boundaries for self-care, be more assertive about rest, recreation and family time, and more readily say ‘No’ to extra responsibilities. Ways to achieve this varied, and included, for example, one minister buying a property out of town that required regular maintenance. The presence of Pasifika values in some parishes does make this more of a challenge, since the expectations of a minister in the Islands are considerable:

- I've got to be careful that I don't overcommit myself, because we have lots of (*ethnic*) community functions....I've got to be careful. I go to the gym but it's being busy to the point of burnout.
So PCANZ's idea of ministers having two days off a week now would be a bit of myth for you?
(Wryly) Do we get days off? (Baruch).

However ministers also noted that their review report did help parish leaders better understand their need for regular time out. Jacob was "wonderfully surprised" when his elders agreed he needed to prioritise both time off and study leave over the next ministry season, and Reuben mentioned how an experience of depression had helped him realise he had never had four weeks "doing nothing" in decades of parish ministry.

5.2.3 *Mental Health*

Other ministers also spoke of themselves or colleagues experiencing burnout or depression. Some mentioned the 2006 report about NZ Presbyterian ministers under stress; Zara was "stunned by the horrifying statistics." Many of the Baptists mentioned that fewer than half are left in ministry from their year group and described churches where members believed people with mental illness can't be pastors. Breakdown often coincided with a bad experience in church or family life; Caleb left a previous church because a "significant disconnect" was affecting his mental health. Ethan told of a difficult ministry season he experienced, which led to his being treated for depression:

- It was extraordinarily painful and difficult and it's taken a long time to get over ... I had virtually no support from PCANZ or Presbytery, none, which was a bit disheartening...you're pretty isolated, pretty lonely... I'm still on medication now but weaning off...I'd heard from John Daniel that there were quite a few ministers under stress and so I did some reading; I looked at burnout, disillusion and disenchantment, and I was astonished and appalled. (*Even though*) most people's depression only lasts 3-6 months, or maybe a year, in some churches ministers suffering depression dare not say anything 'cos they'd be fired, in the (*governance*) system they work under....In the PCANZ there are people who think this. A Presbytery elder said to me "if ministers can't stand the heat in the kitchen, I'd tell them to get out." A younger couple said, "it doesn't happen." But another one, a senior pastor I admired, told me how some years ago he was driving home after a night meeting and (*seriously considered driving into*) a truck on the road opposite him. Praise God, he didn't. My jaw dropped open.
It was entirely secret?
Entirely secret, he'd told nobody. I was probably the first he ever told (Ethan).

Caleb reported similar stereotypes about mental health issues in the Baptist context:

- One guy attempted suicide, and in his restoration process, the church said, "There's obviously something sinful and demonic in your life..." which is insane. They just rejected him.
That was in a Baptist church?
In a Baptist church,they basically burnt him out.... It's sad, cos he'sgot an amazing pastoral heart....I think it adds a strength to your ministry, having to deal with that. And I know for a fact that there's a significant part of our congregation that are dealing with mental health issues, depression and suicide and all sorts of things.

So who better to minister to than somebody who's got a healthy perspective on it? (*another*) up-and-coming Baptist pastor, brilliant guy, waslonely and depressed...and seeking help to alleviate it, (*but*) the church didn't do anything....Expected him to solve all of his own problems. It crushed him...he resigned (Caleb).

The interviews also demonstrated how Study and Supervision are resources that can help ministers become more self-aware, and responsible for their personal and vocational development.

5.2.4 Study

All participants were tertiary-educated, some to doctoral level. All but one had studied theology at their denominational seminary, either Knox Centre for Ministry and Leadership (formerly Knox Theological Hall) or Carey Baptist College (formerly NZ Baptist Theological College). Both denominations award Study Leave at the rate of one day for each month served as a church pastor. A number of ministers spoke about the benefits of extended study leave, as well as occasional courses they had attended (e.g. a denominational Risk Management seminar). One Baptist who took a Carey paper recently is now planning a major study leave on Biblical models of leadership, "to get a better handle on it and hopefully be a better pastor" (Obed). One Presbyterian had recently completed a postgraduate degree by blending part-time study with ministry duties; by contrast, Zara stated that getting some ministers to undertake formal study can be "like getting blood out of a stone."

Many clergy spoke of management books they had read; authors most mentioned were Jim Collins, Peter Drucker, and Bill Hybels. Some used business language, (e.g. late adopters, action log, wicked problems), and often recalled leadership wisdom they had learned from visiting churches in New Zealand (Spreydon Baptist, Bethlehem Baptist), as well as some celebrated megachurches in the US (Willow Creek and Saddleback). Several Presbyterians saw how a Ministry Development Review can sharpen up self-awareness and influence plans for study, by identifying pathways profitable for self-development or leading congregational mission.

- I've done courses along the way but I've had three major study leaves...saved the maximum and done major things with it...people do things differently but I have found that has been the best thing, in both self-care and learning, for me....(*the review*) helped me think about what I want to do now with (*the last study project*) (Zara).

Presbyterian study leave is not an unstructured sabbatical for refreshment, but explicitly academic, in the sense that a 2000 word written report is required, for the benefit of the parish and other ministers. The Baptist Handbook tends to merge the two concepts of study leave and sabbatical, though Noah understood the distinction clearly, and bristled at the notion of a proviso that the pastor commit to staying in the parish on their return:

- I don't need study leave, I prefer to do study on the job. All I need is Sabbath....to get away for long enough to let the dust settle so I can hear the voice of God (elders) expecting a commitment to another run is just ridiculous, it belittles the contribution you've made. A sabbatical is a recognition of what you have given....(if) someone has been pouring his life into something for seven years, don't pin things to it, just bless them and send them off to recharge their batteries (Noah).

5.2.5 Supervision

All participants had experienced pastoral supervision, although several Baptists were not currently attending due to a variety of circumstances. Supervision is not mandatory for Baptists, although meeting with a supervisor or mentor is required for pastor registration. Regular (monthly) supervision for Presbyterian ministers became mandatory in 2004; the cost is borne by the parish, as part of the terms of call, and attendance is checked in the minister's Development Review. Although one pastor was critical of his supervisor's competency, most participants spoke very positively of their supervision experience.

- Everyone needs an ear....someone you can just offload to. Otherwise if you think you can carry a burden all by yourself and not resolve it, it's just unhealthy, I think.... you're just so caught up and you're too close to the issue, and sometimes it's difficult to see the bigger picture. So I think supervision is crucial for that (Baruch).

Deborah described her supervision as very helpful, and wondered why pastors in training are not more strongly encouraged into supervision. At Carey Baptist College they are told to get a mentor, but Deborah sees mentoring as quite different from supervision, and would choose the supervisor over a mentor now.

Both Reuben and Ethan spoke about times of depression. Reuben found insightful supervision at that time provided good feedback; in fact, he said "I went to supervision shaped one way and came home a different person". Ethan described having virtually no support, during a breakdown, but acknowledged he did not have a supervisor at that time.

Several in both groups mentioned processing a review with their supervisor, one even has his supervisor sit in on the annual review as a result of a bad experience first time around. Having the supervisor or some other outside person present is akin to the principle of "*whaanau* support," developed for Maori interviewees to have family present to support and advocate, and now usually available to all employees (D. Jones, 1997). It can soften the feedback offered and remind parish leaders of the spiritual and interpersonal values they espouse.

Although supervision is widely understood to have a useful protective function, safeguarding the welfare of both ministers and their parishioners, some ambivalence was expressed about it being seen as a magic bullet. Four people, including all the

women, noted that the scope of pastoral supervision is limited to what the supervisee takes for discussion; some of their ambivalence relates to the disconcerting fact that ministers found guilty of sexual misconduct are usually attending supervision.

For Carey graduates, ministry support was often received from meeting with a class group where each has time to talk about how they're doing, and no question is unaskable by the others:

- The guys that went through (*Carey*) training together meet every year....that's pretty robust, honest...the place we've been able to have people speak into your lives... Everybody needs some wise people who they can trust, who will tell you when you're wrong....we can violently disagree and be best of friends...robust (colleagues) will tell you, if are a jerk (*Tobit*).

Reuben, a senior minister in the Presbyterian Church, spoke of his hankering for that kind of collegiality, especially when he was going through personal difficulties. He recalled gatherings of ministers who, despite having different theological perspectives, shared a sense of call and a commitment to the Presbyterian way. By serving on national and regional committees together, they experienced a collegiality that built bridges across their differences, but today those committee structures have been radically picked apart. Denominational training days now often embrace elders, a welcome inclusion that has definite benefits, but has deprived ministers of a space to share their professional concerns in private. The Baptist practice of gathering a cluster of pastors in similar roles is now being trialled in some Presbyteries.

Participants were asked if there were any surprises in their review reports; despite their expressed anxieties about "things people weren't telling them", most felt there was little that took them by surprise:

- I've yet to have any nasty surprises. But I think it's because I'm getting plenty of truth coming through other directions.... if there were surprises, it would be a surprise (*Avi*).

Ministers operate as individuals, but always in the context of a faith community. That means working with people collaboratively is a competency that can be a focus in their review, and brings in a new construct, Collaboration.

5.3 Collaboration

The word Collaboration came to be applied to the selective codes as stories about the process and interpretation of a review were told; feedback and shared governance brought out themes of power, conflict and ownership. All participants led churches where governance responsibilities are undertaken by a team comprised of clergy and non-clergy leaders, to which the generic term elders is applied. In many churches today, this ancient concept of a wise older man now embraces female leaders and younger people. Reviews all gathered feedback from elders, all or some, and many canvassed a sample from the wider congregation.

Themes that emerged as relevant to the collaborative nature of a ministry role are membership of the review panel, sharing of the review findings, and working with people in conflict. Responses relating to the formal reviews of Presbyterian congregations, undertaken by a Presbytery visiting team, are presented later under the construct “Imagination”, because they relate to strategic planning.

5.3.1 *The Review Panel:*

Most reviews, whether they used a formal tool or a more *ad hoc* evaluation method, employed some sort of multi-rater feedback from parish leaders or members. Many participants were able to make recommendations about who would be on the review panel, and this was seen as the most satisfactory way to get information from people who knew the minister’s daily work. Ministers (and reviewers) wanted a good cross section of age and gender, qualities of honesty and engagement, and at least some people with professional backgrounds who would understand the process of review in the context of a largely self-directed occupation.

- The elders that have been doing the reviews here, one’s a bit more pastoral, the other one is more business orientated....certainly not yes people who come in to tickle your fancy....we’re very aware. We speak open-mindedly (Tobit).

Micah noted that he was “more adventurous” with the panel for his second review, while Levi mentioned purposely including a person with whom he had been in a degree of conflict. Others also spoke of intentionally including people not within the usual circle, and Hannah saw the review as an opportunity to educate the congregation about the work of the minister and how to evaluate that.

Some Baptists expressed concern about the panel, seeing the elders as good, wise people but not necessarily competent in conducting a clergy review. Caleb spoke about selecting the review panel in a small Baptist church:

- It was supposed to be a random selection by the eldership. Some were fixed – elders, staff, ministry leaders - and a group of the congregation. But I found out afterwards

that certain people within the congregation were lobbying to get access to the forms. So it was somewhat skewed ...they had an agenda from the start..... family groups in the church have an influence, it's one of the flaws of a small church (Caleb).

The issue of getting reliable feedback from a Pacific Island Presbyterian congregation came up in some interviews. I noted that a reviewer had said some Pasifika elders were reluctant to speak about the minister in positive or negative terms, and asked if that was a factor. The two Pasifika ministers did not feel it had been in their case, but they acknowledged that “pride” and “loyalty” can supersede the integrity of the review:

- In Pacific ministries, the people will either love you or hate you. But even if they hate you, they'll tell the third person they love you.....people have pride....the reviewer has to find a way to see beneath that (Jacob).

In both groups, ministers reported making changes in their ministry as a result of the review feedback. One minister started using more effective means of monitoring use of time; another started pastoral visiting, which had not been included in his job description.

5.3.2 Sharing the Review Findings

When the review findings include recommendations for ministerial development that will involve financial cost, or time away from the parish, a Presbyterian reviewer is required to advise the elders. Even when this was not the case, most Presbyterian ministers spoke of sharing the Ministry Development Review report, or key points from it, with their elders or wider leadership teams. Many elders felt they were entitled to see the report anyway, and were surprised that this was usually a matter for the minister to decide; they felt that since the parish pays for the review they are entitled to some feedback. That expectation is reasonable given that the old “quinquennial visitation” reports were always released to the church and the wider Presbytery. Micah, a participant who is also a reviewer, had a helpful explanation for those who challenged the policy:

- I noticed with my own reviews andreviews I did, is that people on the panels were quite frustrated that they didn't get to see the report. They felt that there was something a little underhand about that. They were giving quite a lot of themselves, but because of the confidentiality of the report, they didn't get to see it.... many had participated in church reviews before, and there was always a public document that they could look at and say. “I made a contribution there”. In a few cases, (*it was*) wanting to be in control.

Yes. Was this in your parish – or reviews that you did?

Both, butthose that were made to me as a reviewer were more blunt: “Why can't we see this? Who says we can't?”

So how did you respond to those challenges?

Just saying, “This is the process that we have been given.” I tried to explain that for ministers to participate well in the process, there was a need for some sense of privacy. And probably on the lines that it gives the reviewer a chance to have a private conversation with the minister, that they need to hear, but it wouldn't necessarily be helpful for other people to hear (Micah).

Documented reporting to the congregation from a Baptist review seems a low priority. Many could not recall if there was a verbal or written report to the congregation after their review, and others said that just the fact it has taken place is reported. One described asking about written reports in his first pastoral role after a career in the civil service and being given an “incredulous look.” Obed’s comment also testifies to an organisational value of informality:

- I’m very conscious that at my last annual review they didn’t actually take any minutes, so I’m just going to have to remember. There a few things we let ourselves down on (Obed).

5.3.3 *Working with People*

Reviews operate as just one component of the congregational feedback cycle which is, to greater or lesser extent, part of the communication matrix of the organisation. Many of the ministers spoke more generally about working with people. They described effective teams with good communication, and delegated responsibility and authority with checks and balances. Ministers often mentioned identifying people’s gifts, using tools like Network or Strengths Finder, and that their congregation’s culture placed priority on recruiting people to ministry roles that utilised their strengths. That sometimes required a deep level of honesty, which was one of four critical values for leaders in Avi’s congregation:

- We have four team values – which we ask anyone who joins the team to sign-off on – although it takes a year or so to come round to really owning them They create the culture. #1 is we’ll tell each other 100% truth, because it affects our ministry and our relationship with each other. #2 is, I’ll be non-defensive when someone tells me what they believe is the truth, and we insist on that. And we work with each other to help each other be non-defensive. And then there’s (#3) I will share, I will own, the ministry with each other member of the team.... ownership means a commitment to actually ask questions, to offer help, never to control....we’re in it as much as they are, even though this is their responsibility. (#4) is, we’ll trust each other. But you’ve got to have those other three things (for that to work)...
- Do you do it as a covenant, or do you just say these values?*
- They’re discussed ...spelled out in the letter of call. And we regularly go through our values, talk about them pragmatically. What does it look like?...(*Telling the truth*) has resulted in people changing their roles (Avi).

Managing conflict was a recurring theme. In reflecting back on ministry performance, some pastors told of major conflicts that had required them to engage in intentional and time-consuming peace-building, in one case taking several years to find lasting resolution. This leadership competency was displayed by ministers of both denominations and several mentioned “agreeing to disagree” following a robust debate conducted with mutual respect – what Tobit called “good manners”. It was the Baptist ministers who described the most difficult conflicts with elders: their comments included the terms “rocky journey,” “dysfunctional family” and “behaving badly.”

- There's a lot of immaturity in how they speak about each other, and how disrespectful and disparaging they are. I'm thinking, When you ridicule someone else because of a weakness or a flaw in their character, that's not very mature (Caleb).

This issue was mentioned by only one Presbyterian, perhaps because a better understanding of the elder role has been handed down in the definitions and duties prescribed in the Book of Order, but several Baptist participants canvassed the need for elders to be trained and reviewed. Deborah observed that the average person who becomes an elder doesn't have much idea of their role or job description, while Samuel's regular reviews by the church elders are reciprocated by his assessing them on an agreed five-point scale. Several in both traditions spoke of performance factors being environmental and not solely the pastor's responsibility.

Collaborative governance does require skilled leadership, and review conversations reveal that this is most keenly observed in the future-facing areas of vision and change, the construct of Imagination.

5.4 Imagination

The third construct was related to the minister's role in leading collaborative planning and a vital sense of the mission of the local church. The word Imagination is used in contemporary Christian and business literature to describe leadership that is both relevant and transformational, as well as participative. Pastors who are familiar with the Biblical traditions of story, song and poetry frequently apply imagination in preaching, teaching and dreaming of a preferred future. A review will often raise issues of personal and church vision, and stimulate consideration of the directions for the future. Issues that emerged from the ministers' reviews related to the need for a wider congregational review, the leader's role in shaping vision, and the ways that people experience God when dreaming and planning.

5.4.1 Parish Reviews

Planning for the future in Baptist and Presbyterian churches is a co-operative exercise involving pastor, elders and some or all members. For this reason, review needs to be undertaken on a congregational level, in addition to evaluation of the individual pastor. In a local church, these reviews are often an annual exercise of identifying mission goals, and setting ministry objectives for the individuals or teams responsible for the various areas of the church's life.

The Presbyterian clergy review is one component of a wider review structure that includes three-yearly congregational reviews, undertaken by a visiting team from the Presbytery. Congregational reviews are needed because “you can’t separate the minister off” (Hannah); the elders are also accountable, and may in fact be more responsible for difficulties than the minister. The system is still being implemented and the teams trained, and is based on ten years of experimenting with the traditional Quinquennial Visitation. That exercise used a team of Presbytery members – elders and clergy – and an interrogatory style to probe into the material and spiritual health of the parish. Baruch recalled that if Quinquennial Visitation teams were unfamiliar with the local context, they could be reluctant to judge the work of the congregation, especially where different cultures were involved. The current wider church reviews are much more about the members themselves evaluating their own mission and strategy. Zara, a Presbytery leader, described the confluence of the two review perspectives in her own and other churches:

- At that stage (*of the minister review*) we were in the midst ofputting together the strategic mission plan, that was great that we had the two things going at once...it helped me in my thinking. (*My*) review completed the picture...it brought different pieces together....we say that the spirit is operating and I think it definitely was, because it just came together beautifully....but (*in other cases*) it depends on how long you’ve got between a ministry review and a parish review, for everything to get agonisingly awful (Zara).

Baptists have congregational reviews as well, conversations about current realities, and visions and plans for the future. Church and staff reviews may be integrated into an annual timetable but can also be addressed on an *ad hoc basis*. As with clergy reviews, the format is usually determined by the local leadership; reflection is based around applying Biblical principles in the particular local context - “doing the right things” and “getting the right outcomes.” Samuel described his expectation that elders would regularly reflect on the health of the church, and discern the direction of the weekly Biblical teaching that he as pastor would implement. Avi’s church, which is well resourced with paid and volunteer leadership, structures in regular congregational reviews, sometimes using an outside facilitator. The exercise has clarified values, encouraged innovation and at times generated major change:

- (*The pastor review*) becomes an assessment of the wholelife and breadth of the church. The elders do, I play some role ...but by and large they do that without me....asking questions about every aspect of the church’s life, including my ministry. (*In a review utilising a regional leader*) I said if I suggested the changes that I think we need, I don’t think the church would buy it. He said “Try it.” And it was radical. ... It meant losing a lot of people. It meant redesigning the whole way the church was structured, how we led. Massive changes. But to my surprise the (*elders and the*) church endorsed it. *So was that going to the ministry-led model?*

Oh, we never used that language at that time. We used language about control, taking the control out of the structure, decentralised a lot of activities. I don't know how much it looks like the ministry-led model, but the change affected every aspect of the church's life. We ...re-wrote our church rules, members meetings, removing all titles from leadership. ...the church needed a reformation....(US pastor) Rick Warren's style of leadership opened my eyes to a completely different way of leading.... employment became not a result of position, but because we wanted more of this person's time. We gave people who were doing a job responsibility to make decisions. And then worked out how accountability works...that was an interesting journey (Avi).

For over ten years, until 2013, the Baptist Union Church Health Consultancy offered a formal Assessment Weekend that evaluated the life of a local congregation and offered recommendations about planning for the future. Deborah recalled participating in one when she was still a volunteer at a local church; the team judged the church was understaffed and recommended recruitment of an additional pastor, a change she saw as a good decision. The Baptist Church Health Assessment is no longer attended to nationally, and each region aims to resource churches in appropriate ways through local personnel; the same applies to the PCANZ which discontinued its national Mission Resource consultancy ten years ago.

5.4.2 *Shaping a Congregational Vision*

The participants described a number of ways congregational mission and vision is shaped, and organisational strategies are planned. Some alluded to the relationship within the Godhead or Trinity, an image of dancing (perichoresis) that helpfully models unity, diversity and mutuality within the faith community. Ethan described how his two reviews have helped him clarify his core leadership role as “blue sky thinking” that helps shared goals to be identified and achieved. Hannah and Baruch reflected on how mission has been indigenised in their local context. Hannah's church has reviewed their understanding of the place of children in worship:

- In respect to the children (*in worship*), I talked to some of the old people and pointed out it was their mission....After that many years of sitting in church, if they didn't know what the gospel said, there was something wrong. And they picked it up as their mission, and ...it changed our congregation, because they sawwhat they needed to do. Not sit in church and just be comfortable. And it made a difference... (Hannah).

Baruch's congregation is implementing a more unified vision across different Pasifika groups:

- (*In a multi-ethnic church*) we cannot afford tooperate separately, the diversity is part of the richness. If we say we're together in name but not by practice, it's not being faithful to what we believe. Church is really about unity in Christ and our diversity within the trinity....that's a crucial balancing act.
I was thinking perichoresis as you were talking.
That's right (Baruch).

For many the challenge is that of helping people – both leaders and members - develop their “missional imagination” through a realisation that the church exists for the purposes of God in the world. “What we’re trying to do”, said Hannah, “is get the people in the parishes looking out”. Avi’s collective team reviews try to think laterally, and ask courageous questions like “What’s the biggest issue we’re not facing right now? or “the most scary truth we’re not willing to admit?”

Reflection on vision, goals and strategies needs to take place in an environment of mutual trust, because taking outward-focused mission seriously can mean significant change. Many small churches are typically older people who are not keen to change things too much; Caleb recalled a visiting preacher who told one church that they needed to do something urgently, or in 10 years’ time they’d all be gone and there’d just be “a beautiful empty building”. Levi has also encountered resistance:

- There is a lot of fear of change and it forces people to retreat and be custodial... (*whereas*) what we’ve managed to achieve here has been full of generosity and energy and giving something a go (Levi).

Where there is that energy and trust, ministers have found there can be huge licence to change things, so that looking forward becomes the norm:

- We’re creating a strategic alliance with X.... a massive shift in focus and direction. And I’ve steered that. I’ve dreamed it and steered it... The review process has been affirming enough of my way of working with people, that I’ve had the confidence to try this stuff out (Levi).

The leader’s role is to clarify and communicate a God-given congregational vision for the church, as Samuel’s experience testifies:

- (*Early on*) I wrote a story. A story of a couple who came back to visit (*the church*) after a five-years’ absence.... What they experienced and ... what they saw. We painted a picture that was five years away, and put it out there as our vision statement.
Your “I have a dream” speech? “We have a dream”?
“We have a dream”. And we just called it ‘Imagine’. The congregation had that story for three months and then were asked to vote on that picture.....And we had a unanimous approval of it.... every year the Imagine document is put back before the congregation,...so far they have not sought an adjustment, (*we*) accept that initial unanimous decision clearly had the hand of the Lord on it (Samuel).

5.4.3 *Experiencing God*

Reviewing vision and forward planning in a church is a prayerful exercise, where it is assumed that God will guide the decisions of minister, elders and members. Some mentioned the importance of gathering for prayer as integral to this visioning exercise, and others acknowledged that the spiritual dimension can get crowded out by a focus on strategy and resolutions. This spiritual dimension of leadership was implicit in all the

conversations, and in the theological terms participants employed, such as calling, grace, gratitude and evil. But I also asked about God at work in the review experience, and some agreed they had seen that, especially in how they reflected on the experience and processed the report. Micah uses spoken prayer in the reviews he leads:

- *Have you seen God at work in reviews that you've received or given?*
I tend to see God everywhere, so that's easy for me.... I always made prayer quite a key element in the reviews that I took.... praying together, rather than just me praying.
Yes. Before, after, in the middle?
Before – beginning and ending. I guess there's a self-selection goes on in terms of who the reviewer is. People had chosen me because they felt I fitted...so that probably gave me a sense of freedom to do that (Micah).

Noah described the tension between robust HRM practices he had experienced in the business sector, and the less tangible dynamics of ministry work:

- An issue alongside (*review*) is that blend between best practice HR disciplines in the church ...and the weird animal that is pastoral ministry ... it's not just a business with KPIs and stuff like that...being close to Jesus and hearing his voice and doing his bidding....to have things to shoot for and to pray for and to want to dream for, is slightly more ethereal...
It's mysterious.
It is. It's mysterious....sometimes I can labour away hard and suddenly when God's blessing comes it's a little bit mysterious, a little bit different (Noah).

Many of the Baptists did not expect to experience God's direction and challenge through a review, which was surprising given their awareness of God in other contexts of church life:

- *Do you see God at work in reviews?*
I don't actually think too much about that. In my personal quiet times, through my supervisor, through a spiritual director...through my elders, God has the opportunity to speak to me. I didn't really see God in the process of review. And I guess I didn't really expect to see him either, which is a funny thing, I don't know why. Certainly the guys that had bad ones....I think they saw them as something separate from God again. I don't think they saw them as God speaking (*more*) as people speaking.
Even though the Baptist polity is that God speaks through people?
I think they saw them as someone crabby with them, rather than God trying to address some things in their life....I guess I expected to hear from God in other ways rather than through the review. I saw the review as just what people might say.... It's interesting to think about it...Because the Baptist thing is that we hear from God through the people.
Very human people. That's the crunch, isn't it?
Yeah. It is the crunch (Deborah).

Motivating people with a sense of God's purpose and creating an outward-facing mind-set is part of the wider concerns of both denominations. In the review conversations, this was clearly connected to one's sense of call and an ongoing experience of compatibility with the local church.

5.5 Vocation

The construct Vocation emphasises a sense of call as well as the experience of finding meaning and personal fulfilment in one's work. For a minister, vocation often begins with candidating with a denomination and being selected for training, but there is also an ongoing degree of oversight by the local Presbytery, or the wider family of Baptist churches. Reviews, both locally-led and nationally-mandated, play into that oversight, as denominations find ways to equip and safeguard human talent in whom they have invested. Issues of recruitment and retention are critical for the vitality of both churches in this study, and managing termination of a ministry appointment appropriately is also important. Three issues included here are the follow-up to Presbyterian reviews, reviewing the terms of call documentation, and the ways that a clergy review can test the strength of the "pastoral tie" - the engagement between pastor and people

5.5.1 *Presbyterian Review Outcomes*

Some negative outcomes from Baptist reviews have been described above, but the Presbyterian Review system is nationally applied, and so has implications for recruitment and retention of ministers in the denomination as a whole. Because there are felt to be important ramifications in the review – ministers may be prevented from conducting weddings, or accepting another call - some trepidation was experienced, especially the first time around, as Jacob reports:

- I was a little bit anxious going into it. I was (*worried about*) being told you can't do this job anymore. Being told you're incompetent. Being told that you're not suitedBecause when you think of review, you think of school teachers who lose their licence, medical practitioners who lose their licence, and you kind of think on that same vein....that the recommendation could come back, "this guy is no good" and in six months you vacate the parish, you're not meeting the ends of ministry...or you're not going to be able to do the weddings, whatever (Jacob).

Several of the Presbyterians were very involved in their Presbytery and were familiar with the national review programme and what it was intended to achieve. However, they voiced concerns about what happens to the review reports, and especially whether the process has any "teeth" if incompetency or other concern is revealed. Zara asked "What happens with concerns triggered by these reviews? What's the process for them to be addressed?"

When a parish is struggling, it may be to do with the 'fit' between pastor and people, or the session itself might be dysfunctional. In the past, Presbytery visitations sometimes encouraged a pastor to move, and most times their ministry flourished in the new context. Micah described "verbal attacks from elders and their wives" in one parish and "harsh treatment, and verbal attacks" in another, which had led to the ministers feeling unsafe; he supported them in moving on, seeing the welfare of the minister as a key concern for

the Presbytery. But where the clergy are incompetent or not coping, the situation is more problematic. Reviewers must take heed of natural justice and confidentiality; as Hannah said, “it is trickier, you are into semi-employment issues, though a conversation is always useful.”

Some Presbyterian participants mentioned the fact that regional committees can get creative, and find other ways to deal with problem clergy, so I asked about the provision mentioned in the documents for the Presbytery to arrange some sort of pastoral conversation with the reviewee. This possibility was relatively unknown, even to people who have important roles in the Presbytery, so such follow-up is either deeply secret or not happening at all. Two ministers mentioned their concern that the review was still the “ambulance at the bottom of the cliff.”

- I don’t know whether it has a lot of teeth...What happens if the review picked up that ... (a minister was) about to completely hit the wall. What happens? Is the reviewer able to say something to someone.... does the review process allow for that sort of thing? Another step ... has it got any teeth?
I guess that would have to be with the minister’s agreement.
Yeah. See, what if the minister says no? ...
The question at the back of your mind is, the minister could stand in the way, manipulate or evade, good questions, yeah.
....it’s hugely important to get below the surface. Whether this review process allows that to happen, I’m not sure. We tend to be,...the ambulance at the end of the cliff (Jacob).

5.5.2 Terms of Call

Reviews normally evaluate performance against an agreed job description, and several Baptists mentioned the need to review or amend the “Terms of Call.” They described their job description as being “generic”, or “outdated” by the time of their review. Obed felt that whatever was written down, there was an “underlying culture” that could be quite different and only emerged over time. Noah told of a colleague whose review went badly because of divergent expectations:

- It’s not fair to review a Pastor based on performance criteria that he didn’t know he was required to complete (say) if there’s a change of Board and no institutional memory about what the church wanted the Pastor to be or do when he was called....a church will think they want something but it’s not until the person’s been in the role that they discover what they really want and what the person can do, so I think you have to let the dust settle, then there needs to be a healthy robust process which really asks the question “now we have some understanding of each other, what are we called to build here, what’s your part and what’s my part?” And “we said when we interviewed you that we really want you to do this but actually what we really want you to do is this” (Noah).

The timing of the reviews came up for discussion in some interviews, and Micah wondered if a beginning minister should have some sort of gentle inquiry in their first

year, as is the Methodist practice. Noah also felt a beginning minister needs an early review, and offered some recommendations for the Baptist movement:

- I think rather than seeing performance reviews as an event in isolation it should be seen as an integral part of the spiritual and professional development of pastors, that starts when they're called into the role. Healthy, clear call process that tries to get the right fit from day one. Then within the first 12 months, there needs to be a sit down, we thought we were going to be playing this game, actually we're discovering that we going to do this, and ... do a review of how's the fit going and what do we really want our Pastor to be and do. That sets up a regular, whether it's six monthly, 12 monthly, or 24 monthly, process of reviewing, moving towards what it is we want to build. What does a win look like? So that might be a clear strategic plan or it might be more fuzzy than that, but it gives a sense of what it is we're building together and that there is a built-in performance review process with one person on the eldership who's responsible (Noah).

5.5.3 *Testing the Call*

Ministers in both denominations spoke of their experience of review in terms of testing the pastoral tie - the call to a specific local congregation - or even their vocation to ministry overall. Most found their reviews had reaffirmed their sense of call, and found that the feedback involved reassured them that the 'fit' was still good, the pastoral relationship was "still working". This was helpful when work stresses and difficult people had made them (or their spouse) wonder it was time to do something else. Many mentioned how their review functions as a way of assessing the ongoing strength of the pastoral tie, and hoped if they were "becoming less helpful than helpful" (Levi), the review process would bring that to light. Baruch mentioned not wanting to outstay his welcome or be a burden on the congregation; Tobit doesn't want to be "the last person to know" that he shouldn't stay. Avi's church has a radical way of answering the 'go or stay' question; members have a postal vote every five years as to whether he should carry on as Senior Pastor:

- I asked for that (*vote about my tenure*) because I watched churches were unhappy with their minister, (*where*) there had to be a bloodbath to get rid of the person. I thought "that's crazy. I don't want to be in a church where people don't want me. I'd hate to not know it, so let's get it out in the open....When the Lord wants me out of here, I want to be out.....the church has never supported me stopping....I've come to the conclusion it's been right to stay.
So you hold it lightly in that sense?
Well, it's a calling, isn't it? ...And no-one is indispensable...(the review) is a good time for re-thinking your own involvement.... It can keep you in the job. (Avi).

Because reviews often contributed to a sense of the solidarity of the call, they helped a minister think about their long-term ministry goals, including retirement, or becoming bivocational. Sometimes a ministry term was due for renewal (in a cooperating venture with other denominations) so the exercise was required anyway. In other cases, ministers under review were on the cusp of retirement, and the affirming experience of

review encouraged them to keep going. Participants used terms like “stepping out of ministry” or “running out of steam” as they considered how their future might be shaped and whether there was another invitation opening up, even if it was unknown:

- Being able to sit down and think about ...your goals for the future in terms of perhaps how much longer you had in this (*role*), what you'd want to achieve...one of the challenges in my review was what did I want to do before I retired from ministry? What were the things I wanted to finish off? What did I need to do to have a sense of completion in this parish? So I think that ministry reviews, if they're well done, can actually help people do that (Zara).

There was a concern voiced about some ministers' inability to accurately perceive their fit, perhaps those who were trained decades ago when ministry had a status in the community, and who seemed to hold an expectation of being set up for life. Energy and competence may have dissipated; ageing members may have such minister-centric expectations that 'collaborative ministry' and 'missional goals' are hard to implement. Levi described some ministers in his Presbytery as “quite blind” to current parish realities, and lacking insight into how their skills might transfer to other roles; wives having settled jobs in the city contributed to the conundrum. They needed courage, he felt, to see it was time to move on, for the good of the church. He described his sense that call is a privilege:

- *We talked on the way here about how you feel it's quite a privileged position to be in pastoral ministry, that people are paying your stipend out of their income, and that you want to honour that, with doing your best...*
Yeah, that's about my own personal development, about how I use my time ... I tend to err on the side of doing extra...as they give out of their extra, so I give extra...One of the things I'm really big on about ordination is this idea of what the Presbyterians calls the 'pastoral tie', and I kind of see it as a mantle, something that's placed on you. We're in that relationship with these people where there's something that's above just normal interactions. An ability is bestowed, in a way, by God, to actually love these people. So grumbles about a particular incident ...shift into, “I wonder what's going on, how can I care for that person?” ...I understand ministry to be with, not a.... It's a servant role (Levi).

A Tagxedo word cloud is presented in Figure 4 overleaf using in-vivo clergy testimony that was particularly evocative. The size of the letters is indicative and does not represent quantitative data.

5.6 Summary of Findings

The fifteen ministers interviewed for this study reported many differing experiences of performance review, from structured and timetabled exercises through to clumsy efforts that were subjective and skewed. Baptist and Presbyterian ministers were able to endorse features like an outside reviewer and documented goals, but at the same time widespread concerns were expressed about the purposes and processes that were applied. Use of an outside facilitator to widen the elders' perspective was welcomed by pastors in both traditions.

Participants made connections between their review conversations, and spiritual and psychological growth (Formation) and they also described how the collective leadership in Baptist or Presbyterian churches comes under scrutiny in an individual pastor review (Collaboration). Reviews contribute to evaluating and developing a pastor's role in leading vision and managing change in the church (Imagination), and the evaluation exercise also shaped a sense of calling in the local and wider church (Vocation).

Clergy review in these ministers' experience has potential as a strategy to recruit and retain valuable human talent. When a review process is an authentic conversation that is collaborative, transparent and appropriately confidential, it is a positive, even life-changing experience that enhances engagement and growth. However it also has potential to shatter the pastor's self-confidence and upset the equilibrium of the pastoral tie. Clergy review conversations:

- engage pastor and people in a useful focused conversation
- reveal the quality of engagement - the pastoral tie
- enhance the capacity for envisioning the future
- point to ways the relationship might be strengthened, and
- provide a warning when the pastoral tie is at risk.

The Discussion of Chapter 6 interprets these findings, and the church policies reviewed, in the light of current literature in the Management, Organisational Psychology, and Church Leadership contexts. The five constructs revealed by theory-building stage of the Methodology are presented and explained in depth.

6. Discussion - Clergy Review Conversations

- *This chapter incorporates the main literature review into the Discussion in accordance with Grounded Theory Methodology which concludes the literature review upon completion of data analysis.*
- *Interview and document analysis interpret the purposes and processes for clergy review applied in the Baptist and Presbyterian Church denominations in NZ, which are then related to current literature in the Management, Organisational Psychology, and Church Leadership contexts.*
- *The chapter views the ministers' experiences in terms of the normative, formative and restorative aspects of clergy review conversation, focussed around important evaluative questions relating to the four theoretical constructs of ministerial formation, collaborative leadership, missional imagination and vocational management. HRM principles are applied to review of clergy performance and considered in light of the different nature of ministry work.*
- *The chapter finds that:*
 - *Review conversations in churches are challenging because they relate to intangible ministry goals, hesitancy in criticising respected leaders, and a lack of training in performance management techniques; they are crucial because they could lead to ending of the pastoral tie.*
 - *Formation is about how spirituality, self-awareness, supervision, study and self-care can augment and apply the learnings from a clergy review.*
 - *Collaboration is a salient feature that acknowledges the importance of gifted ministry teams, accountability based on trust and transparency, and a healthy feedback culture in contributing to a pastoral leader's effectiveness.*
 - *Imagination describes how social change has significantly impacted churches, and how mental models of mission, and the creative use of story, can feed into a minister's leadership of congregation's vision.*
 - *The construct of Vocation is a salient feature because the strategic actions of parishes and denominations impact engagement and retention of the human talent in which they have invested.*

An organization is a living network of people and groups in conversation.... (when) mediocre organizations fail to center on questions with real heart and meaning, conversation becomes a mechanical process of people talking and moving and reporting back, without generating the energy and excitement that compels commitment. *Isaacs and Brown, The World Café, 2005, p*

Four salient features of a clergy review emerge from this research with Presbyterian and Baptist ministers and tie in with the central notion of a “review conversation”. A conversation is a feature of human relationship, and involves respectful curiosity on both sides, opportunity to express viewpoints, and a degree of tact and sensibility (Baab, 2015). Through conversations, people “discover what they know, share it with their colleagues, and create new knowledge for the organization (Webber, 1993, p. 10).

Performance reviews that take the shape of a conversation are becoming more common in the business sector, and are particularly relevant to the helping professions, where appraisal needs to be a collaborative effort (Branson, 2004; Grainger, 2008). Conversations are creative tools that form, nurture and transform organisations by developing caring, collaboration and commitment (Brown & Isaacs, 2005; Cooperrider & Whitney, 2005).

In contrast, the traditional performance review can be experienced as a lecture from management, based on mechanistic evaluations which function poorly as constructive feedback (Culbert, 2010; Fleetwood & Hesketh, 2010; G. Roberts & Pregitzer, 2007). Culbert (2010) has identified many shortcomings in conventional performance management, and recommends a 'preview' conversation that uses a mutual-accountability paradigm to focus on the future more than the past. Protecting the valuable human talent of a church minister should involve assessment and reflection conversations that release energy and guide development; reviews are meant to be a tool not a weapon (Forte, 2014; Hudson, 1992). A strict business model of performance management may not fit all the realities of parish ministry, but practices may be learned from other contexts where professionals work unsupervised on hard-to-measure tasks (Beal, 2010; Peyton & Gatrell, 2013). Systematic performance review conversations are now found in professional contexts like education, health care and social work.

This study reveals that clergy appraisals are taking place, in a mandatory programme in the PCANZ, and in discretionary reviews in the Baptist family of churches. Ministers and other leaders may express concern that the Church is adopting ill-fitting business practices, but a participant who came into the Baptist ministry from a senior role in the public service welcomes review as a way to identify goals and concerns. An older Presbyterian minister celebrated his PCANZ Review experience as a wise interpretation of his context, and the most supportive thing the church had done for him in years. However many ministers interviewed for this study voiced concerns about review tools and processes; Presbyterian concerns centred on effective follow-up to the Ministry Development reviews, while Baptists' criticisms were mainly focussed on the dearth of robust and regular pastor reviews.

Church management literature shows that some churches are reluctant to incorporate evaluation into the pastoral relationship, either because they have an exalted notion of a minister's status, or because they believe clergy inadequacies are overcome by a supernatural filling of the gaps (Beal, 2010). In New Zealand these scenarios occur in some ethnic churches (P3, personal communication October 3, 2014), but participants

in this study also reported older ministers exhibiting entitlement or the view that evaluation of their work is somehow impertinent. This is the “faithful servant” model of clericalism, which ascribes effectiveness to a minister simply because of their elite status (Beal, 2010). Some of Peyton and Gatrell’s (2013) clergy sample saw themselves as self-regulating, accountable to God and their own sense of responsibility. Others, though, felt their review processes were not sufficiently critical, that they need to be more robust “to pick up difficulties and training needs before breakdown occurs” (Peyton & Gatrell, 2013, p. 98). This response is paralleled by a study of British GP’s, where some annual appraisals were perceived as low-challenge, because the doctors were already committed to critical reflection and goal setting (Nayar, 2005). In the current study, this concern was voiced by a number of pastors, especially those with HRM experience, who expressed concerns that evaluation was not taking place or was poorly planned.

However modern-era hard data tools like management by objectives, SMART goals and timelines may not be relevant for twenty-first century congregations (Hudson, 2004). Review conversation needs to evaluate effectiveness in ministry, not just monitor task completion. Berlinger (2003) points out that some capabilities like “attention to detail” may enhance a minister’s work, but are not threshold competencies for missional leadership. An elderly priest who can recite Mass and administer last rites may not bring long-term effectiveness (Beal, 2010). A Presbyterian insider spoke of older ministers “waiting it out” for retirement, or even staying on after becoming eligible for the Presbyterian superannuation benefit, because they need the money; they remain in an inwardly-focussed mind-set and the congregation is stuck in maintenance mode (P3, personal communication October 3, 2014). Alsop (2013) notes that an important ingredient of appraisal is evaluating the relevance of individual performance to the current organisational context; measures of clergy effectiveness will differ over time and place and are best shaped by the denomination.

Ministry review is said to work best when it is regular, and structured around a predictable framework; Hudson suggests every second or third year once the ministry is settled (Hudson, 2004). The current Presbyterian review system is based on a three-year cycle; Baptist reviews are *ad hoc* but the pastors in this study felt they would benefit from the same predictability. Changes in eldership, leading to different reviewers each time, were counterproductive in several Baptist participants’ experience; a consistent review panel could build up institutional wisdom about both purpose and process. The Presbyterian tool used is standardised, though some ministers reported that language is unacceptably obscure. One minister criticised the use of Bible verses, arguing that using single Scriptures without context is a ‘proof-text mentality’ that does not fit the Presbyterian

theology of scripture; although he was the only ministers noting this, the point is accurate and the format could be reviewed. The underutilised Baptist Union/Kenexa tool is costly in time and personnel, but the structured conversations being piloted by Northern Baptist Association could provide a useful nationally-agreed template, once edited and abridged. This would address the concern expressed by some pastor participants that reviews are not done well in the Baptist movement. Documentation of findings and agreed goals is vital, whichever review tool is used. These may be needed for any emerging disputes but are also necessary for adequate follow-up and development-planning (Luecke, 2006).

Some New Zealand churches described in this study found pastor review mechanisms problematic. Their reluctance was related to intangible ministry goals with few opportunities for tasks to be observed, close relationships within a congregation which make honest evaluation difficult for parishioners, and a lack of training in performance management techniques in churches (see also Zech, 2010). All the participants themselves recognised that a more rigorous approach to ministry evaluation is needed, in order to pursue excellence and develop competency. Appraisal that is both realistic and hopeful is in the interests of both the pastor and the church (Beasley-Murray, 2015c; Zech, 2010).

6.1.1 Ministry is Intangible

Processes used in clergy reviews described by participants mirrored some, or all, of the stages of a standard professional review: critique of recent performance and goal setting, discussion of longer term career plans, and evaluation of individual performance in terms of the organisational context (adapted from Alsop, 2013, p. 44). The mandatory PCANZ review system covers all of these aspects, to some degree or another, depending on the life stage of the minister. However in a local Baptist review conducted by the elders, discussion of a future beyond the parish is problematic, and may be construed as an attempt to terminate the call. Using another pastor, or a regional mission coach, as facilitator could mean those wider issues can be addressed in confidence.

All the Presbyterian reviews and many of the Baptist ones began with a process of self-reflection, with ministers reviewing their own performance against their Job Description and/or a statement of congregational Mission and Vision. However in churches there is often no written job description, or what was agreed in the terms of call has been, formally or informally, amended over time (Beasley-Murray, 2015b). The role is mostly defined by a psychological contract bounded by denominational expectations, parish traditions, and community needs (Nadin & Cassell, 2007; Nichol, 2011). Caleb described

how the Search Committee for his parish told him he was not expected to visit or preach, but over time it became clear that both these ministry areas needed to be part of his leadership role. The first was integral to the psychological contract with his parishioners, the second part of his own call and vision. The review conversation is an ideal time for clarifying shared expectations and prioritising aspects of what can seem a vast job description. The “realistic and hopeful” dialogue also needs to acknowledge that the ‘performance’ of the minister is entwined with that of the church (Hudson, 1992, 2004). The Northern Association kitset includes a specific question about revising the pastor’s Position Description, and also invites comments on deficiencies in the wider leadership that may have affected performance (Northern Baptist Association of Churches, 2013, p. 11). Many Presbyterian participants spoke of the importance of the congregational review, which augments the individual clergy review. Baptists also described their experience of whole church reviews, and sometimes felt the two processes were unhelpfully merged.

Clergy research in the UK has indicated that the concept of appraisal may be difficult to apply with ministers who usually work unsupervised, able to shape the hours and content of the working day (Beasley-Murray, 2015b; Peyton & Gatrell, 2013). Many of the study’s participants acknowledged that ministry work is not confined to set hours, especially when clergy are based at home with computers and smart phones. The Anglican Ministry Development programme in the UK uses self-reflection tools like a Stress Indicator exercise and a 14 day diary; one diary exercise revealed a typical clergy day to stretch across 14 – 16 hours, disrupting family and rest times (Diocese of Lincoln, 2006; Peyton & Gatrell, 2013). This may apply to others in the social sector, such as school principals, but in New Zealand clergy are paid significantly less than their professional peers (Schmidt, 2013). Their roles of leading and navigating congregational mission and ministry are instead shaped by what Peyton and Gatrell (2013, p. 92) call “the sacrificial embrace”, a more intrinsic commitment to a lifestyle that goes beyond doing a job. Bridger distinguishes three aspects of clergy vocational identity – covenant relationship, agape love, and virtue (Bridger, 2003). Covenant and agape both imply going above and beyond, a special relationship that Levi called an ability to love, bestowed by God. Virtue, too, is about more being expected of clergy than of everyday employees. Peyton describes a “Godly surveillance” that extends beyond the public role of pastor, a kind of divine performance management that intrudes into the depths of the soul; if a minister is not authentic in their performance, God will know (Peyton & Gatrell, 2013, p. 122). These intangibles complicate a ministry review conversation.

6.1.2 *Judging and Coaching*

Appraisals in helping professions are often categorised as normative or formative (Gratton, 2004; Nayar, 2005). The distinction between evaluation that determines competency and that which guides professional development was first made in the 1960's, when Scriven contrasted "improvement-focused" formative evaluation, and "go-versus-no-go" summative judgements (Popham, 2013). Today the term normative is often applied to the summative category, when it refers to a process of registering or licensing a practitioner. Where a review is formative, it provides reassurance about competence, and identification of useful avenues for professional development; where it is normative, it is used to benchmark performance and ensure alignment with the parent organisation (Nayar, 2005). Although appraisal of valuable human talent in the helping professions is ideally a collaborative process, aimed at development, in practice the exercise is often used normatively, to benchmark performance and ensure alignment with the parent organisation (Gratton, 2004). The Presbyterian Ministry Development Review handbook states the review is not summative, but it is in fact used as a component of the Certificate of Good Standing. The roles of 'judge' and 'coach' both make important contributions, and some experts think they should always be undertaken separately (Kimberly, 2012; Popham, 2013; Sashkin, 1981). It is true that having a normative function caused some anxiety and defensiveness to study participants in an exercise intended to be affirming and encouraging; however, given the cost of an effective review in time and resources, the decision to integrate the two purposes is understandable. The reality may be that in clergy appraisal, the evaluators have to play both roles (Zech, 2010).

The Presbyterian model of a self-review, followed by broadband feedback and reporting by an outside reviewer was found to be safe and effective, and the Baptist reviews that followed this pattern were also helpful. Self-reflection is a useful strategy used in many reviews both in business and the NFP sector. Luecke (2006, p. 81) notes it empowers the employee and sets a tone of partnership with the reviewers. This ensures the particularities of the work context are understood and increases the likelihood of following up on goals. In performance reviews of high-commitment employees, self-evaluation is often supplemented by the observations of a range of co-workers and subordinates, in multirater or "360 degree" feedback which aims to find out what is like working with or for the person (Lepsinger & Lucia, 1997). This kind of broadband feedback is an extremely helpful ingredient in planning professional development of people who are important to an organisation (Lepsinger & Lucia, 1997). The formal tools used in Baptist and Presbyterian ministry reviews both use multirater feedback, and many of the informal Baptist review conversations also sought comments from elders or members. Often the minister was asked to suggest specific people who had insights into their everyday work.

Hudson (2004) recommends using a review panel who understand the pastoral context; 90% of ministry work is invisible to 90% of the members, 90% of the time.

360 feedback is a useful methodology for testing the accuracy of a leader's self-perceptions, but it can be time-consuming to administer and interpret; it works best when there is an organisational culture of trust, and people are trained in its use (Luecke, 2006; Wells, 2011). The professional interpretation of the Kenexa tool did allow the review facilitator to identify trends and gaps in church understanding of Caleb's work, and was a helpful interpretive adjunct to the feedback data. Several Presbyterians mentioned the reviewer's role in filtering, or at least providing perspective on, outlying or deviant feedback; reviewers are trained in balancing the realistic and hopeful roles of judge and coach (C. Wright, Hannah, & Ward, 2013). Several Baptists mentioned their concern that the reviewing elders speak with one voice, rather than employing a scattergun approach of patchy and subjective feedback (McLean, 2000). The Northern Baptist review kit advises against a general invitation to church members to express their feelings about a pastor, as this can elicit unfocused and unjust responses that may not relate to the agreed tasks (Northern Baptist Association of Churches, 2013). Ward also notes that an informal review can be emotionally risky, as well as lacking the rigour of a structured format (C. Wright et al., 2013). For those reasons, the use of an outside facilitator is preferable to the 'fireside chat' experienced in some contexts. A review conversation is good, but a conversation based on an agreed framework, aligned with others in the denomination, is even better.

6.1.3 Appreciation and Motivation

Ministers of both denominations acknowledge that they get mostly 'brickbats' and very few 'bouquets', so ministry reviews that use an appreciative focus can fill an important motivational gap. An appreciative or strengths-based approach makes room for affirmation of a person's contribution to the enterprise, by building connections and releasing energy instead of defensiveness (Forte, 2014).

Affirmation is, however, something with which both churches and clergy struggle, because of a misplaced fear of pride or flattery; the Bible takes a different view, recommending realistic assessment of one's gifts, and respect for church leaders (see Appendix 5). Catholic priests who were asked about their experience of performance review reported being delighted by the appreciation they received; many mentioned the significance of simple words of encouragement, affirmation, and assurance of prayers (Zech, 2010). The participants in this study also found the affirmation and encouragement they received to be enlivening and enriching. However where clergy

evaluation is delivered within the local context, elders need more guidance in giving and receiving feedback. In fact New Zealand congregational leaders of both traditions could benefit from Learning Cycle workshops, such as those offered by Berlinger in the US, where skills like creative listening, reflective observation and perspective taking are taught (Berlinger, 2010; Moon, 2004). Presbyterian reviewers are specially trained in feedback, but quality varies and moderation may be needed. At the time of these interviews, no auditing was taking place. A timely gathering of reviewers could helpfully engage in a collaborative project to simplify language, reframe scriptures, and align reporting protocols.

The “pastoral aspect” of appraisal, and the opportunity to explore sensitive areas, such as mental health, with a colleague from outside the practice, was mentioned as an implicit benefit of the review system in a survey of Scottish GPs, (Colthart, Cameron, McKinsty, & Blaney, 2008, p. 87). Many participants reported the helpfulness of an outsider reviewer as they test their inner conviction of call against the realities of relationship and parish life. This restorative dimension of review is a third role, after normative and formative, and a way of assessing wellbeing and prescribing needed refreshment, sabbatical or sick leave (Hawkins & Shohet, 2009). Many participants experienced their review as encouraging and pastoral; emotional replenishment is particularly important where lack of appreciation has damaged morale (Peyton & Gatrell, 2013). Luecke notes that employee overload and burnout is compounded by “too few rewards and little acknowledgement” (Luecke, 2006, p. 91). The intrinsic motivation provided by recognition and “encouragement of the heart” becomes critically important in roles like parish ministry (Kouzes & Posner, 1999). Pay must be equitable but it usually cannot be leveraged to ensure great work; there needs to be another answer to the ‘so what?’ Public praise is one way, but affirmation can also come in other forms (G. E. Roberts, 2003). The participatory clergy review conversation contributes to engagement by shaping new possibilities, reframing perspectives, and exciting new commitment (Brown & Isaacs, 2005). Taking a positive approach to clergy review, as an opportunity to dialogue about goals, address problems and seek means of improvement, will benefit both pastor and church (Luecke, 2006). The salient features of such Review Conversations are identified in this study as Formation, Collaboration, Imagination and Vocation.

6.2 Formation

"O wad some power the giftie give us, To see ourselves as others see us
It wad frae many a blunder free us." (*Robbie Burns 1786*)

Formation is the word churches and clergy use for professional development and personal growth. The term came into use in the 1960's Catholic Renewal and is now used widely in churches and in other spiritualities. It refers to the shaping and growth that occurs in a person over their life journey, allowing them to develop awareness of, and responsiveness to, themselves and others. Christians understand that transformation to be a function of a person's relationship with Christ, and believe it is best accomplished in the context of an authentic faith community (Foster, 1978; Pickering, 2008). Alphen, a clergy educator, notes how the focus has changed from 'education' which implied academic learning, to 'formation,' which means the growth of the whole person in multiple dimensions, including spiritual, intellectual, social and emotional (2010). Churches today, he says, aim to foster "a culture of formation" for all believers, not just the clergy (Alphen, 2010, p. 93). Aspects of Formation that can augment and implement the learnings from a clergy review are spirituality, self-awareness, supervision, study and self-care.

6.2.1 Spirituality:

The authors of a 2012 Resilient Ministry Study describe formation as the ongoing process of maturing, both personally and interpersonally (Burns, Chapman, & Guthrie, 2012). Their research identified five key factors in pastor resilience, the first of which is spirituality (Burns et al., 2012). The commitment to Christian spiritual practices that enhance awareness of God and others is a key ingredient in pastoral ministry. A minister's everyday life includes "a sacred blend" of robust exploration of scripture and tradition, a generous attitude to serving others, and intentional practices of prayer, reflection and mindfulness (Pickering, 2008, p. xi). The Presbyterian Ministry Development review uses indicators about enabling spiritual growth of self and others, as well as the ability to reflect theologically and exegete gospel and culture; the Baptist Kenexa tool measures spiritual dynamics of prayerfulness, relevant scriptural preaching and 'walking the talk'. Formation provides rich resources for the listening to God and others that is needed for new ventures in mission (Pickering, 2008). Bridger's (2003) three qualities have already been noted and are aspirational for ministers. Covenant entails generosity, a willingness to go beyond the contractual minimums; agape is a Biblical word for unconditional love, and implies unselfish service and a careful use of power (Bridger, 2003). Virtue demands a professional disposition, deliberate cultivation of character and habits of trustworthiness, prudence and holiness (Bridger, 2003). Hudson (2004) lists practices to enhance the pastor's spiritual journey: a well-developed

prayer life, Bible study not connected to sermon preparation, periodic retreats, work with a spiritual director (or supervisor) and engagement in spiritual disciplines.

6.2.2 Self-awareness

Self-awareness is an important component of formation, one that enhances people skills and organisational leadership (Lidow, 2015; Tjan, 2012; Zenger, 2014), and has also been of critical importance in the largely self-managed vocation of church ministry. Calvin, a sixteenth-century church leader, taught that there is no knowledge of God without a deep knowing of self, and Loyola required his Jesuit monks to daily examine their interior life for both joys and vulnerabilities (Pickering, 2008). More recently, Williams advised loving, truthful self-reflection aimed at knowing what has contributed to one's "typical problems and brick walls" (Williams, 2003, p. 39). Another writer says the "priceless grace of self-knowledge" brings insight and builds compassion (Foster, 1992, p. 29).

The ability to know and manage our own feelings, as well as to read and deal effectively with those of others is known today as Emotional Intelligence, a key leadership competency in businesses and in pastoral ministry (Goleman, 1995; Nieuwhof, 2015). Emotional literacy includes "being able to motivate oneself ...in face of frustration, control impulses and delay gratification, regulate ones mood and keep distress from swamping the ability to think, empathise and hope" (Goleman, 1995, p. 34). Family Systems Theory identifies a parallel competency, "differentiation of self" which refers to the ability to maintain emotional objectivity while at the same time actively relating to key people in our lives (D. L. Jones, 2015). Business consultants today often include Emotional Intelligence skills and Systems Theory training in their repertoire of developmental resources, and see self-awareness coaching as particularly suited for high-value knowledge workers in professional service organisations (Boxall & Purcell, 2011; Davys & Beddoe, 2010; Lepak & Snell, 2002). Churches, too, understand that reflecting not only on the 'what' but also the 'why', gives a useful reflexive perspective on one's own performance; Family Systems thinking is commonly included in seminary training along with typologies of temperament and gifting.

Self-examination and action-reflection are particularly apposite to knowledge work where business and helping professionals manage themselves by pinpointing how they best work and learn (Drucker, 1999). Self-awareness enables healthy self-management, in a "slight stepping back from experience" that hovers above the main flow, aware of what is happening but not being swamped by it (Goleman, 1995, p. 46). This inner calm, more recently called mindfulness, helps shape interactions, inspire others, build intimacy, and put others at ease (Goleman, 1995; Hofstee, 2015). Insight into one's own motivations and behaviours can help leaders find a balance between confidence and humility, and

the ability to cast strong vision while remaining open to others' ideas and opinions (Tjan, 2012). Many study participants mentioned examples of their self-awareness, like knowing one's strengths and weaknesses, learning styles and deeply-held values. The Northern Association's review pack includes specific questions for both pastor and leaders about the pastor's strengths and assets, and areas of shortfall (Northern Baptist Association of Churches, 2013, p. 13).

Two components of clergy review that this study identified as helpful for self-awareness are 360 degree (multi-rater) feedback, and motivational interviewing. Broadband feedback can help fix mistakes, leverage strengths and pinpoint distortions in self-perception, such as a disconnect between values and behaviour (Zenger, 2014). Pastors can usually identify their areas of giftedness but they also need to face up to failure, fear and pride, as well as addictions to substances, work, sex, or power (Pickering, 2008). The mandatory Presbyterian review system, the Baptist Union Kenexa tool, and many of the *ad hoc* evaluation methods used by local churches, gathered multi-rater feedback. Ministers in this study welcomed the opportunity to test their own insights, and realised that neglecting their own woundedness and need for self-care could lead to failure or burnout in their service of others (Pickering, 2008).

Motivational Interviewing is a self-efficacy tool developed in the addiction counselling discipline, and now used in many contexts, including the New Zealand Presbyterian reviewer training. Motivational Interviewing is a collaborative conversation aimed at strengthening a person's intrinsic motivation and commitment to change (McMaster, 2012). The 'spirit' of motivational interviewing is evocative, revealing what was previously unknown, and motivating the minister to make relevant changes (Hannah, 2013, in C. Wright et al., 2013, p. 27). In their personal and professional development, ministers benefit from reviewers who gather and analyse information, make insightful connections and communicate their findings in ways that are affirming and encouraging (C. Wright et al., 2013). Training in Motivational Interviewing would be an asset for Baptist leaders who facilitate clergy reviews.

6.2.3 *Pastoral Supervision*

Ministry Supervision is another ingredient of formation, a tool that helps pastors reflect on their ministry, in depth, and provides a monthly, pastor-initiated, self-review exercise that can helpfully complement the annual or triennial performance review. The supervisee normally sets the agenda, and the supervisor acts as a 'wise listener' in a conversation about skill, capacity and questions raised by the minister's daily work (CAIRA NZ, 2015). Issues discussed might include difficulties in relationships with

parishioners or colleagues, sad or vexing pastoral situations, boundary concerns, and self-care (Pickering, 2008). All participants in this study had experienced pastoral supervision, though supervision is only mandatory for Presbyterians. Ward (1996, part II, p 17), writing about spiritual survival, noted that ministers need at least one person with whom they can honestly reflect on themselves, who can ask the tough questions of “why? what's going on inside? what's driving this?” The mentor or coach needs to be outside the immediate sphere of the minister’s work (Ward, 1996), and this research illustrates how supervision can fulfil this critical aspect of developing self-awareness. Those in the 2015 study who mentioned their current supervision experience were overwhelmingly positive about its usefulness in their ministry life. As in most helping professions, supervision is a form of reflexivity that is seen as necessary for practice that is safe for oneself and others (CAIRA NZ, 2015).

Supervision for Protestant clergy had its roots in social work, and was influenced by the counselling sector which promoted reflective practice for other helping professionals, such as psychologists, youth workers and ministers (Davys & Beddoe, 2010). Today three overlapping functions of clinical supervision are well understood; the educative, support and management aspects, which are also categorised as developmental, resourcing and qualitative functions (Davys & Beddoe, 2010; Hawkins & Shohet, 2009). These functions mirror the formative, restorative and normative purposes of clergy review. During the 1980’s increased concerns about accountability and competence, and revelations of professional misconduct, saw it becoming accepted practice; safety-conscious caring professions, though, accorded the managerial functions priority over education and support (Davys & Beddoe, 2010). This certainly applies in the ministry profession, where the quality of supervision is often questioned when misconduct has been proven. However as several study participants pointed out, a supervisor can only work with what the pastor brings, and supervision is not the safety net for every risk. Good habits of supervision are now a career-long expectation, and have been shown to correlate with job satisfaction as practitioners more effectively use resources, manage workload and challenge inappropriate coping mechanisms (CAIRA NZ, 2015; Cherniss & Egnatios, 1978; Hawkins & Shohet, 2009). Like Māori and Pasifika models, clergy supervision is accorded special treatment and assessment as a distinct category, within a specific culture of spirituality and world view (CAIRA NZ, 2015).

Supervision, then, along with realistic and hopeful evaluation, is a tool in the Human Resource Management bundle of strategies for improving engagement and retention. Northcott’s (2000, p. 13) useful model of performance management strategies places clinical supervision at one pole of a spectrum, based on who sets the agenda:

- disciplinary action (compulsory, employer-driven)
- management (line) supervision
- preceptorship
- appraisal
- mentorship
- clinical supervision (voluntary, employee-driven).

In helping professions, supervision is usually voluntary, and self-driven, a performance management strategy that does not serve line-management purposes. Rather it is a useful HRM tool for the development of self-awareness, self-management and the protection of valuable human talent:

"High quality supervision is one of the most important drivers in ensuring positive outcomes for people who use social services. It has a crucial role to play in the development, retention and motivation of the workforce."
(Children's Workforce Development Council, 2007, p. 2)

6.2.4 Lifelong Learning

Another performance management tool, relating closely to the formational aspect of clergy review, is professional development or lifelong learning. Ongoing study and intellectual stimulation is essential to ministerial formation and longevity; awareness of one's own ignorance is the beginning of a lifelong journey of learning (Candy, 2000). Ongoing education is much broader than postgraduate university study; it includes workplace-based learning, continuing education, and self-directed learning, usually accessed online. High potential church leaders are said to be those capable of "catalytic learning"- scanning for new ideas, absorbing them cognitively and translating that new learning into productive plans for their organisation (M. Smith & Wright, 2011). The participants in the Clergy Review study were demonstrably lifelong learners. They mentioned books, courses, informal church visits and planned programmes of study, usually at their own expense. They use many resources and especially the internet, which Candy (2000, p. 108) calls "a sea of opportunities whereby people seek to be, to become, and to belong." Key attributes of a lifelong learner are an enquiring mind, 'helicopter vision,' information literacy, a sense of personal agency, and a repertoire of learning skills (Candy, 2000, p. 110). Both denominations award Study Leave as part of the standard terms of call; its purpose is to "maintain a vital and educated ministry" by encouraging time away from parish routines in a planned programme of focussed study that will enrich their ministry and benefit the church (Northern Presbytery, 2015). The theological training institutions associated with the clergy sample offer financial and supervisory support for postgraduate study, and occasional courses and conferences that provide rich resources for ministers in active service. In 2015, Carey Baptist College has offered courses on Ecology and Hope, Forgiveness, and Narrative Preaching, while Knox Centre offered a conference on Disability and Mental Health, coaching in missional

leadership and generous grants for ministers' overseas study. Northern Presbytery organised a day seminar on relating Family Systems Theory to church dynamics. Carey College's new Life Long Learning tracks are still bedding in, but offer focused learning experiences, with a staff facilitator and a minister coach; the learning usually involves reading topical books but also utilises journaling, interviewing people, and/or visiting a church, marae or overseas mission project. The programme is integrated with the registration requirements for Baptist pastors. The Kenexa tool includes a question about the pastor's continuing education and personal development, while the Ministry Development Review asks the minister about recent Study Leave and goals for professional development. Reviewers ask and advise about professional development plans; both denominations recognise that the learning gained from an extended period of rest, renewal and study is not just a gift to the minister but an "insurance policy" for the future (Hudson, 2004, p. 91).

6.2.5 Stress and Burnout

Clergy review can function as a means of assessing a pastor's wellbeing and identifying signs of stress, burnout or clinical depression. Stress is "a state of fatigue, ill health and often depression" related to being distressed or emotionally overwhelmed (Hawkins & Shohet, 2009, p. 225). Stress hormones are released when the body is alarmed, e.g. by work stress, and if the adrenalin response remains activated, a negative cycle can result (Pickering, 2008). Schmidt (2013) notes that an understanding of one's own Myers Briggs Temperament Types can enhance self-awareness and dissipate stress. Introverts, for example, may be relieved to know that others too may find the intense relationality of pastoral care draining, while Extroverts as a group may find it difficult to get into the study to prepare the weekly sermon (Baab, 2003). This study found that pastoral supervision can provide an outlet, as can colleagues who offer a listening ear and candid questions (Hudson, 2004; Schnase, 1991). Hawkins and Shohet (2009) describe the need for a safe place to "bitch, moan and whinge"; it seems the supportive gatherings of Baptist-trained pastors can provide such safety, but some of the Presbyterians described a deficit of opportunities for collegial conversations. Their feelings of isolation, and a postmodern hankering for close, spiritual connections, could be addressed by PCANZ sponsoring more class reunions, cluster groups and minister-only days.

Phillips' (2009) study of research and statistics from NZ, Australia, Canada and the US, revealed major issues with clergy retention. The exit of pastors from the vocation was mainly related to occupational stress, emotional turmoil caused by an imbalance between job demands and the capacity of the carer (Mandy & Tinley, 2004). Articles in the New Zealand Baptist magazine describe unbearable conflicting expectations on

pastors (Baptist Research and Historical Society, 2014, vol 121/10, p 3494) and churches as hard taskmasters (Baptist Research and Historical Society, 2014, vol 119/6, p 2884). Unrealistic expectations of clergy, without adequate support, can lead to pastor burnout, the “internal frustration, confusion, and disillusionment caused by an inconsistency between a pastor's beliefs....and the daily reality of life and ministry” (Sherman, 2015, see also Hawkins and Shohet, 2009). Baab (2003) notes that lack of choices, unmanageable workload, and not feeling valued are features not just of clergy burnout, but of severe depletion of volunteers in the church as well. Clergy experience stress not only from the cognitive dissonance of mismatched role and reality, but also from ‘emotional labour’ - the need to regulate their emotions and appear professional when dealing with needy people (McShane & Travaglione, 2007; Schaefer & Jacobsen, 2009). A minister must spend their working life pretending to like people they cannot stand, and always appear “warm, affable, approachable, and unflappable” in public (Schmidt, 2013, p. 156). A clergy survey in Australia found that clergy may display positive affect at the same time as they are experiencing emotional exhaustion, and warns congregations not to let pastors’ high levels of expressed satisfaction obscure the evidence of burnout (Francis, Robbins, Kaldor, & Castle, 2009).

Several Presbyterian ministers in this study mentioned the 2006 Report into Presbyterian Clergy that described isolation, despair and depression, with “stress among our ministers....growing to levels that should cause serious concern” (Daniel & Marquand, 2006, p. 17). They were also aware of Gallaher’s (2007) research into stress and burnout that found 75% PCANZ ministers admitted to periods of exhaustion, 50% were currently struggling, and many had recently experienced a desire to quit ministry altogether Phillips’ (2009) study described churches responding negatively to, or even firing, a pastor suffering from depression, a symptom of burnout that occurs in 25% of ministers; some participants in the 2015 Clergy Review study also reported astonishing reactions to a treatable clinical diagnosis (Sturt, 1998). Judgments like “a man of God can’t be depressed” or “you must have something sinful in your life,” are not only lacking in compassion, they suggest a neglect of an organisation’s responsibility to keep staff safe and healthy (Department of Labour, 2003). Both Baptist and Presbyterian churches would do well to intentionally challenge negative attitudes to mental ill-health. Addressing the progressive depletion expressed in burnout, says Baab (2003), will involve congregations countering warped beliefs and misplaced values, modelling a biblical rhythm of work and rest, and rediscovering the joy of practising Sabbath rest.

"To be effective at work...it is vital to be constantly learning, and attending to how we nourish and sustain all aspects of our being” (Hawkins & Shohet, 2009, p. 16). HR managers today welcome talented workers taking charge of their own development

plans, and seeking to improve quality, develop competence and sustain themselves (Hawkins & Shohet, 2009; Ringo, Schweyer, deMarco, Jones, & Lesser, 2008). Clergy interviewed in this study report taking responsibility for their development and self-care, even when the urgent and immediate demand attention. HR practices like development reviews can enable ministers to learn practices of self-renewal that bring energy, creativity and compassion and remind them of human, vocational and spiritual support that is available. They can also use their review to take a 'helicopter' or 'balcony' view, a position sufficiently distant from everyday operations to see the larger picture (Rendle & Mann, 2003). Spiritual practices, Supervision, and Review are all appropriate means of engaging in perspective-taking conversations on present needs and future goals.

Burns et al (2012) define formation as an ongoing process of maturing, and identify five key factors in pastor resilience, four of which are aspects of formation identified in this study: spirituality, self-care, emotional intelligence, and leadership skills. Clergy who are resilient see their work as something that nourishes the rest of their lives, from a sweet spot where a person's deep gladness and the world's deep hunger meet (Buechner, 1993). They understand that it is not possible to be all knowing or perfect, and they accept their failures with a self-compassion that keeps them open and alert. A thoughtful and balanced review conversation can enhance that awareness and self-renewal in a realistic and hopeful way.

6.3 Collaboration

There are different kinds of spiritual gifts, but the same Spirit is the source of them all. There are different kinds of service, but we serve the same Lord.
God works in different ways, but it is the same God who does the work in all of us. (1 Cor 12: 4 – 6)

The Collaboration construct reflects the widespread concerns reflected by the research participants about how their review processes, and wider ministry issues, are impacted by shared governance, accountability, power, and conflict. In Baptist and Presbyterian churches, teams of elders contribute to the governance of the church, and these leadership teams need to recognise their own and others' gifts in building a participative organisation (Beasley-Murray, 2015a). However the ministry is eminently political. It involves negotiating, prioritising, sensitive timing, dealing with resistance, and identifying the informal and formal sources of power (Burns et al., 2012). Well-managed feedback loops are an important component of collaborative leadership and of the constructive clergy review; both the Kenexa tool and the Presbyterian Ministry Development Review assesses competencies in communication, managing conflict and other interpersonal dynamics. Important aspects of the Collaboration construct are gifted ministry teams, accountability based on trust and transparency, and a healthy feedback culture.

6.3.1 *Gifted Teams*

Team-based leadership is an aspect of collaborative polity that appeals to the postmodern yearning for a spirituality of authentic community (Cladis, 1999; Easum & Bandy, 1997; Ward, 2013). Ward's research with effective congregations found "high levels of participation" and "effective leadership which uses members' gifts" to be key measures of congregational vitality for a twenty-first century cultural landscape (Ward, 2013, p. 39). Both the Baptist and Presbyterian denominations have an edge here, because historically they have relied on collaboration between clergy and "lay" or volunteer leaders to govern the church. Presbyterians spread the load regionally and nationally in a hierarchy of courts, while Baptists largely reserve the decisions for locals. But in both contexts, a congregation looking to worship, care, serve and reach out beyond its walls is authorised to make key decisions in a collaboration of local leaders and members.

However, this study reveals that both systems have their flaws. Baptist participants told of founding families lobbying to influence a pastor review, about elders behaving badly and speaking spitefully, about criticism, ridicule and bullying of pastoral staff, and about pastors who have little real power but bear the blame for the church's misfortunes anyway. Kaiser (2006, p. 34) calls this the "problem of democracy" in Baptist congregational governance. Congregational polity arose in the time of the European

Reformation, in Nonconformist offshoots such as the Swiss Anabaptists and the English Separatists. Like the Presbyterians of the same era, they broke with the Catholic tradition of assigning priestly functions to a select few, and rediscovered the Biblical principle of “the priesthood of all believers” (Guy, 2012). The English group that became NZ Baptists took the further step of rejecting any human spiritual authority outside the local congregation, but that polity generated a number of problems (Kaiser, 2006):

1. A tendency towards church splits, which have been “elevated to an art form” by Baptists (Kaiser, 2006, p. 35). Church meetings become polarised and the members attack one another (Beasley-Murray, 2015a; Winslade, 2009).
2. A climate of spiritual immaturity, where the majority sets the (low) standard and people prioritise their own needs over the good of the community (Winslade, 1994).
3. A platform for controllers who manipulate decision-making, even after the members’ meeting has finished (Surber, 2014).
4. A fuzzy and unstable sense of mission, because a committee of everyone cannot easily clarify and communicate a vision (Beasley-Murray, 2015a).

These dynamics all emerged in pastoral reviews reported in this study and testify to the organisational climate of a Baptist church being likely to pose many challenges to their pastors.

The input from Presbyterian participants demonstrated how these issues occur in Presbyterian parishes too, and one experienced reviewer also shared examples of verbal abuse and ministers not feeling safe. However in Presbyterian polity the issues are more subtly nuanced, in what Kaiser (2006, p. 36) calls the “problems of oligarchy,” where elders apply their collective ignorance to critical issues without reference to the members. “Boards of non-vocational volunteers with limited time and energy can become isolated, impatient, and self-justifying” (Kaiser, 2006, p. 38). In Presbyterian churches, elders ordained for life may be reluctant to retire, and governance decisions can be bogged down by lovely but unsuitable people who may have been awarded eldership as a prize for seniority (Coleman, 2003; Miller, 2002). Baptist elders, too, may see themselves as “spiritual ombudsmen,” but mediation is not their role (Winslade, 2006, in Baptist Research and Historical Society, 2014, p. 3766). Elders today are no longer bearded sages who check attendance and guard morality; they are called to function collaboratively as accountable directors, workplace proprietors, spiritual counsellors, and missional leaders (Vischer, 1992).

Understanding and leveraging people’s differing gifts was mentioned by a number of participants in respect of effective leadership. A mismatch of gifts and responsibilities is seen in both Baptist and Presbyterian contexts, and several pastor participants mentioned the need for elders to review their own performance and receive training in

governance. This concern is also seen in business sector concerns about board quality (Argyris, 1991; Greenleaf, 1991; Pulakos, Mueller-Hanson, O'Leary, & Meyrowitz, 2012). There are some review questions for boards in Baptist documents, but reviewing elders is not widely practised (Baptist Churches of New Zealand, 2014b). The Presbyterian congregational reviews, which are not yet fully implemented, could provide useful feedback to ruling elders, based on some of the competencies used for ministers (Presbyterian Church of Aotearoa New Zealand, 2015). Both Baptists and Presbyterians have a *taonga* – a sacred treasure - in the Biblical idea of 'every member ministry' undergirded by the rule of elders, but it is a gift that requires careful management (Coleman, 2003).

6.3.2 *Trust and Transparency*

In an effective collaborative leadership team, the contributions of pastor, eldership and congregation are all important. The mutuality of what Kaiser calls 'Accountable Leadership' - where people trust the pastor to lead, and pastors trust the people to implement mission - contrasts sharply with the control-based governance structures of the past (Kaiser, 2006; see also McGregor, 1957). The eldership's job is to provide both accountability and support to the minister, like a team of African warriors protecting and encouraging their chief (Kaiser, 2006). Weak governance groups neglect to affirm achievement or challenge incompetence, while fierce controllers hide agendas and undermine staff; a strong team will ensure their leader enjoys both autonomy and accountability (Kaiser, 2006). Working collaboratively with a gifted team, a pastor can ensure that team decisions are implemented, its people are cared for and God's mission is pursued (W. C. Wright, 2000). The issues at stake, as described in the clergy interviews, are trust and transparency.

Historically, trusted leaders in the early churches are said to have been free "to respond to visions, develop creative partnerships, and initiate indigenous worship" without being controlled by permission or procedures (Easum & Bandy, 1997, p. 110). Viable leadership models for the postmodern church can offer the same collaborative responsiveness, if they are grounded in trust (Cladis, 1999). Effective leaders show how they are implementing shared goals, and model the values they commend, but they chafe, as Levi said, at being put on a lead. This is the alchemy of trust, according to HR manager Kaufman (2012), but the church has a much more ancient paradigm to deploy; the "perichoretic" dance of God as Trinity – a dynamic, participative, relationship characterised by intimacy, equality, gifts and love (Cladis, 1999, p. 182). When people are engaged in such a conversational dance, they experience curiosity, engage in deep listening, and take delight in each other (Brown & Isaacs, 2005). Rendle and Mann

(2003) call this a “holy” conversation, one centred on identity and purpose, and relationship with God.

In a trustful climate, people feel they have permission to ask good questions. They may be the positive questions of a strengths-based approach like Appreciative Inquiry: “how are you doing?”, “what has changed?” and “what support do you need?” (Brown & Isaacs, 2005; Samuels, 2003). Appreciative Inquiry is a participatory form of evaluation used in many contexts worldwide, to enhance engagement, retention and morale (Branson, 2004; Dunlap, 2008; Zech, 2010). This study found several ministers had experienced [reviews](#) that used an appreciative paradigm, in Anglican and Methodist churches; they evoked useful feedback for both the individual minister and the organisation as whole. The positive focus of the questions can build connections, release energy and shape “memories, perceptions and hopes” (Branson, 2004, p. 25). Ministers in this project and in the wider church contexts note that their formal clergy review is the sometimes the only time they receive clear affirmation of their work, although feedback that sandwiches negative concerns within layers of praise can be irksome and hollow (Argyris et al., 2014; Zech, 2010). Sometimes simply expressing gratitude is enough to keep a pastor in the job. Review conversations that offer gentle probing questions around the strength of the pastoral tie can contribute to the protection and support of valuable ministry talent, both lay and clergy. Other useful questions are more lateral; one pastor shared about the quirky questions that are posed at his team’s leadership retreats, such as, “what’s the biggest issue we’re not facing right now?” Unpredictable questions challenge rigidity and help develop curiosity, leading to respectful conversations and new insights (Brown & Isaacs, 2005).

Sometimes, however, the review questions need to call ministers out on behaviours that exploit the self-managed lifestyle of ministry. A lack of clear lines of accountability can allow “lazy leaders” to manage time or documentation poorly, spend time online at the expense of relationships, or be frequently inaccessible for no apparent reason (Simpson, 2010). For example, two participants described colleagues whose sense of entitlement led to demanding, autocratic leadership, a counterproductive mentality that leads to taking volunteers for granted and never expressing gratitude (Kouzes & Posner, 1999; Simpson, 2010). Cladis (1999) recommends leaders wishing to exercise participative management draw up a team covenant, covering values, ethics and congregational culture, in other words, explicating the psychological contract (Nichol, 2011). The four values that undergird team reviews in Avi’s church offer a useful paradigm for a team covenant: trust, truth-telling, non-defensiveness, and ownership of ministry together. Owens (2014, p. 1) observes that within the context of covenant, “both lavish praise and brutal honesty” can have a home. Clergy review is one context for such respectful

dialogue, and seems to be most effective when it is integrated into an intentional culture of regular feedback.

6.3.3 Feedback Culture

Feedback is an effective performance management tool which is best woven into the fabric of everyday work, a two-way conversation about behavioural goals where the participants acknowledge their own biases (Argyris et al., 2014). A healthy feedback culture can reinforce achievement, identify needed change and develop a climate of problem solving. It should be undergirded by values of trust, respect and responsiveness and be followed up by documentation of an action plan (Hudson, 2004; Pulakos et al., 2012). However feedback can be counterproductive when it concerns factors the recipient cannot easily change, or when they are emotionally vulnerable (Argyris et al., 2014; Luecke, 2006). Clergy participants found the feedback aspects of a mandatory or discretionary clergy review could provide encouragement, affirmation and useful guidance for change, but they also described reviews that were poorly timed, judgmental, or targeted at wider social or congregational issues that are not easily changed by pastor interventions. Argyris et al (2014) note feedback is inappropriate when it is based on a personal preference, characteristic or habit, but church members often dispense unsolicited advice about “your personal life, the way you dress, your use of colloquialisms, your kids, your personality, and how much you spend on a car” (Phillips, 2009, p. 27). In face of subjective criticisms that have little to do with the mission of the church, pastors will often dig in their heels; however focussing on relevant specifics in a feedback conversation can be a powerful tool for engaging their human talent. Regular feedback can keep high performers engaged and motivated, and is a wise investment of time and energy (Argyris et al., 2014). Measuring success and failure may be hard for parishioners because what ministers do is often invisible, but a good feedback loop will ensure the review panel is familiar with the minister’s term of call, the job description of staff they manage, and the church’s overall vision for mission (Beasley-Murray, 2015b; Hudson, 2004).

Functional church structures like the Baptist Ministry-led Model and Presbyterian “trim-elderships” rely on trust and transparency, within proscribed boundaries of beliefs and ethics (Coleman, 2003; Easum & Bandy, 1997; Kirkpatrick & Hopper, 1997; Ward, 2013). This means pastor and people must regularly be in dialogue to share understandings and clarify expectations (Herrington, 2000; Kirkpatrick & Hopper, 1997). Such feedback conversations will not be free of conflicts and tensions. Ministers need to discern whether resolution is possible or desirable, and learn how living with differences can, sometimes, help their leadership mature (Burns et al., 2012). Lencioni

(2002) notes that the energy of honest resistance can be a resource for change; reasonable people do not have to get their own way, they just need to know that their input was considered. Several of the ministers in this project spoke of ‘agreeing to disagree’ in a courteous manner, in a culture of trust and authenticity (Gray & Tucker, 1986). The Baptist Kenexa tool evaluates the minister on collaboration and the ability to “help the community move forward despite conflicting views” (Baptist Union of New Zealand, 2004). The Presbyterian Ministry Development Review also identifies desirable communicational skills like negotiation and persuasion, and looks for evidence of pastoral sensitivity, interpersonal encouragement and challenge of unhealthy patterns, while contra-indicators are talking over people and not answering messages (C. Wright et al., 2013).

The skills of social interaction - empathy, collaborating, storytelling, and innovating with others - are a vital adjunct to heuristic work (Colvin, 2015). Research shows that when humans work together, the knowledge, cohesion and motivation of the team are less important to teamwork than soft skills like the ability to sense the thoughts and feelings of others (Colvin, 2014, 2015). Colvin (2014) notes that women-only or mixed groups function better than teams of men, a result which he ascribes to women’s higher levels of social skill. That begs the question of whether the Baptist churches where pastor reviews were experienced as inadequate were male-only elderships, information that was not sought in this study.

In common with workplaces in other sectors, churches that create dynamic teams that utilise gifts, cultivate collaboration and pursue shared goals can achieve vitality and relevance in today’s changing world (Cladis, 1999; Ward, 2013). For ministers to be accountable to a leadership team does not mean that they risk compromising their first loyalty to God, because pastoral accountability is about trust and transparency, rather than power or control (Beasley-Murray, 2015b). In a trustful climate, the structured feedback of a review can provide the glue of engagement that holds pastor and people together in effective collaborative leadership (Beasley-Murray, 2015b; Cladis, 1999; Kaiser, 2006). Collaborative leadership is most effective when it achieves both accountability and support; clergy review, conducted by an external facilitator with understanding of the context, can be a great source of realistic and hopeful encouragement and affirmation (Beasley-Murray, 2015c).

6.4 Imagination

God can do anything, you know—far more than you could ever imagine or guess or request in your wildest dreams! He does it not by pushing us around but by working within us, his Spirit deeply and gently within us. (*Ephesians 3: 20*)

The third construct, Imagination, was introduced at the data analysis stage of this study as a feature to reflect the minister's leadership role in collaborative planning, and discerning the mission and purpose of the local church. Imagination occurs in the same semantic field as words like innovation, inspiration, vision and dreams, and is used in contemporary Christian literature to describe transformational leadership in a post-modern culture (Strom, 2014). A review is an opportunity to reflect on personal and church vision, and may prompt new ideas and fresh goals. Pastors interviewed for this study clearly understood vision, strategy and change management to be processes which encompass the spirituality of the faith community. Church leaders are custodians of the faith community's deepest values, and are charged with articulating, interpreting and implementing them in the church and the world (Carroll, 1991; Rendle, 2002). The Presbyterian and Baptist review tools assessed both vision and change-management, although the Kenexa tool paid less attention to these than to practical functions like preaching and pastoral care (Baptist Union of New Zealand, 2004; PCANZ General Assembly Office, 2014). All review systems surveyed in this project assumed that goal-setting was part of the exercise, and that the church must have already "given thought to the shape and direction of its ministry in the community" (Northern Baptist Association of Churches, 2013, p. 3). All minister participants described evaluating current realities so as to think about and plan for the future, for them as individuals and corporately in the church. Many referred to wider congregational reviews, and to the notion of a strategic plan, an agreed document which lays out a vision for the future with broad objectives that help measure progress and allocate resources (Wimberly, 2011). Strategic dynamics are, however, not confined to formal action plans or the ministry budget; strategy is embedded in all the important choices leaders and members of a church make about what to do and how to do it (Boxall & Purcell, 2011). It should be the glue that ensures all parts work in harmony (Wimberly, 2011). Because the word strategy is rooted in ancient Greek military concepts of command and control, congregational expectations may entail images of a heroic leader who articulates a vision and lets the staff work out the details (Boxall & Purcell, 2011). Indeed that 'CEO model' is found in some churches (Johnston, 2012), but not usually those of Presbyterians and Baptists. Boxall and Purcell (2011) note that visionary heroic leaders may not have all the needed wisdom in business strategy, and that important knowledge may be dispersed throughout the organisation.

The churches in this study describe dispersed knowledge using the notion of the “priesthood of all believers,” which acknowledges God equips and calls every member to ministry and is an important value in Baptist and Presbyterian congregations (Bolitho, 1993; Vischer, 1991). Collaborative leadership that leverages the strengths of many, in discerning and executing vision, can unite people around a common purpose (Cladis, 1999; Wimberly, 2011). Participation means that the pastors’ role in strategy, particularly in small churches of under 100 members, needs to be a mix of leadership vision and management implementation, of keeping a lookout on the far horizon as well as attending to current realities (Burns et al., 2012; Galindo, 2004; Wimberly, 2011). The participants recognised that a volunteer concern must attend to some maintenance of the organisation, or the human or financial resources will not be available to undergird the church’s wider influence (Galindo, 2004). Problems of ‘viability’ and ‘competitive advantage’ present themselves, although survival is not the only issue; for a church, formational questions like ‘What has God called us to do or be?’ are also important. Praying together and reflecting on how each understands God’s purposes can enrich dialogue, foster the imagination and deepen a sense of partnership (Hudson, 2004; Strom, 2014). The clergy reviews often addressed the effectiveness of the minister in stimulating the parish’s ‘missional imagination’ in a changing social climate (Roxburgh, 2011). The Imagination construct relates to the impact of social change on churches, to mental models of mission, and the pastor’s creative use of story.

6.4.1 Social Change

However recent decades have seen Western society experience tectonic cultural shifts that can be both exhilarating and incapacitating, and many institutions, including the churches, are facing an uncertain future (Hudson, 2004; Ward, 2002). In a changing cultural milieu, one that Jamieson (2004) describes as moving from dry land to being afloat on an ocean, different rules apply. Postmodern individualism, privatism, pluralism, relativism and anti-institutionalism mean that today’s spiritual seekers are increasingly unlikely to look for help in the local church (Potter, 2014; Ward, 2013). Christian communities are being challenged to make deep shifts in philosophy and praxis by developing a missional mentality that becomes more innovative in connecting people with God. Deeper theological or liturgical preparation is not the “added value” pastors need; graduates of ministerial formation programmes today come with factory settings of transformational leadership, change management and a preference for outward-focused ‘missional imagination’ over institutional maintenance (Galindo, 2004; Rendle, 2002).

The phrase 'missional imagination' is a twist on Brueggeman's 1978 notion of "prophetic imagination", where the task of Christian ministry was described as nurturing an alternative consciousness that challenges the dominant culture (Brueggemann, 2001). Using examples from the Hebrew Bible, and portraying Jesus of Nazareth as the definitive role model for radical prophetic imagining, Brueggemann (2001) called on ministers to critique society, energise creativity, and construct an alternative community. Today that imagination is called upon to express the gospel in forms that connect with contemporary culture in a recalibrated 'missional', or 'emerging' church (Harris, 2015). A renaissance in thinking about mission is transforming both the character and the expression of the church in the world, by focusing on Christian practices that are more about 'being' than 'doing' (Frost, 2011; McLaren, 2008; Ward, 2013). Minister-centric assumptions that mission is located in buildings are being exchanged for an awareness that God is already at work, in the neighbourhood (Johnston, 2012; Roxburgh, 2011). Some congregations have responded to the postmodern longing for spiritual connection through community enterprises that provide alternative opportunities to explore values and questions; movements like Fresh Expressions in the UK, and the Emerging Church in the US, are engaging with people's interests, talents and journeys, wherever they live and work (Potter, 2014; Roxburgh, 2011). The idea of waystations for wayfarers has been applied in New Zealand to help post-Christian seekers to find meaning, friendship and faith without jeopardising their integrity (Jamieson, 2004). Potter (2006) likens the new approaches to moving from an orchestra and conductor, to a jazz band improvising a new tune.

The Presbyterian Ministry Development Review evaluates a minister's vision in relation to connecting the congregational life to the purposes of God (the "missio Dei") while the Baptist Kenexa review asks how well the pastor can clarify and implement the church's vision; both denominations have been teaching pastors a missional focus for some years. An energised pastoral imagination requires leaders and churches to challenge ecclesiastical norms and relinquish old roles (Ammerman & Farnsley, 1997; Carroll, 2006; Hudson, 2004). However, being inspired by lofty concepts like "the people of God partnering with God's redemptive mission in the world" (McNeal, 2009, p. 136), has its drawbacks. Pastors can feel trapped between these postmodern possibilities and the anxiety their parishioners exhibit at the prospect of radical change and dislodging past routines (Ammerman & Farnsley, 1997; Hudson, 1992). They must balance care of existing members with reaching hurting people outside the faith community; ministers must "dance through minefields" as they find a rhythm between transactional and transformational leadership (Hudson, 2004, p. 30). Jamieson uses a different metaphor; society is liquid, no longer fixed and dependable, he says (2004, p. 149), and members and elders want to "sandbag it" with custodial responses as described in the study

findings. “We live inside the images we hold of the world, and it can be disturbing to have to see differently” (Brown & Isaacs, 2005, p. 601).

6.4.2 *Mental Models*

The pastoral leadership competency of curating change is not a matter of simply adopting the latest programme from megachurches like Willow Creek; it is more of a quiet deliberate organic process of changing course (Collins, 2001). It is not a universally valid ‘best practice’ but finding bundles of practices that ‘fit best’; in a process of reflective learning, ministers come to know the strengths of others and how to use their teams effectively in their own context (Boxall & Purcell, 2011). The ministers in this study spoke of collaborative discernment of call and purpose, the *raison d’être* of the faith community, and of asking visionary questions like “what does God wants this church to be like?” They facilitated strategic actions in a mix of formal planning and emergent strategy, and acknowledged the power of mental models, cognitive factors, that can expand or limit the range of options considered (Boxall & Purcell, 2011; Roehling et al., 2005). Johnston, a New Zealand clergy coach, writes at length about such mental models and the ways they can ‘disable’ congregational imagination (Johnston, 2012).

When members of New Zealand congregations engage conversations about their goals, Johnston (2012) says, they dream of the church being more lively, more community-oriented, more evangelistic, more inspiring or more kids friendly, and often lay the responsibility for turning around declining attendance and engagement on the pastor. But many ministers who are “good pastoral practitioners, sensitive liturgists, practical preachers of scripture, and competent managers of community life,” were probably not trained to lead systemic congregational change (Johnston, 2012, p. 2). They can struggle to make sense of the postmodern cultural milieu, and find ministry today is like an uneasy ride on a bike with a square wheel (Johnston, 2012). This leads to anxiety and burnout, compounded by the exit of once-loyal members in search of a church that will ‘meet their needs’ (Gallaher, 2007; Ward, 2013).

Pastors seeking to lead deep change are learning to consciously seek “the Spirit’s signature” in the realities of every day individual and community life, even though that presence may be marked by “conflict, interruption, disruption and surprise” (Johnston, 2012, p. 6). Missional change leaders must manage their own anxiety, and that of the community, and reframe resistance as a creative force that can be leveraged to increase participation and engagement (Ford, 2009; Steinke, 2006). By choosing a non-anxious, but deeply connected stance, ministers can exert their influence and help the spirit’s work of shaping congregational imagination (Steinke, 2006). Although postmodernity can threaten the core values of Christian identity, it does offer new opportunities for authenticity and community, and forces Christians to distinguish matters of style over

matters of substance (Hudson, 2004). As trust is built and values are clarified, vision and energy for change can emerge. One minister described how her congregation has grappled with the issue of children in church, while another saw God at work in the integration of separate ethnic groups into a common vision.

6.4.3 Story

The cultivation of new habits, behaviours and practices is a broader shift than clergy imagination, but the minister's role in shaping a conceptual alternative is not insignificant (Ammerman & Farnsley, 1997; Brueggemann, 2001). Clergy have the time, training and imagination to be alert to shifts in 'the wind of the Spirit', and to lead needed adjustments of the congregational sails (Simpson, 2010). They are called to "clarify, articulate and implement vision" (Baptist Union of New Zealand, 2004, p. 4) and have privileged access, in preaching and presiding, to congregational hearts and minds. Using the richness of literature, poetry and prayer in the Christian treasury, they can re-present the future in symbols, stories and images that can shape the congregation's culture in powerful ways (Carroll, 2006). One of the ministers told how he was able to successfully embed a vision for indigenous change by writing a congregational narrative called 'Imagine'; another described his vision leadership role as one of "dreaming and steering'. Missional leaders use opportunistic conversations to shape identity, and apply multiple perspectives based on lived trust more than cognitive belief (Jamieson, 2004). A leadership consultancy describes this as the 'second road', the way of invention, imagination, and innovation where rhetoric and story, risks and hunches all have a place (Strom, 2014, p. 75). These co-creative strategies for wise leadership, says Strom, owe much to Polanyi's notion of tacit knowledge (Strom, 2014; Torrance, 1998). The 'human coefficient' of personal knowing can help postmodern pilgrims bridge the chasm between vision and reality, and find new meaning crafted in crucial conversations and healthy dialogue (Patterson, Grenny, McMillan, & Switzler, 2012; Strom, 2014).

"Leaders are those that recognise the place we are in and ask the right sort of questions. Leaders are those that get on the balcony every now and then and frame the challenge that they are facing in order not to become chaplains to an inadequate imagination. And then leaders are those that take the initiative to act for a renewed... imagination under the leading of the Spirit."

(Johnston, 2012, p. 12).

A realistic clergy review conversation is a useful tool to ask new questions about the future, and explore and hopeful and relevant answers that guide strategy in the present.

6.5 Vocation

Being a pastor is at once the worst of all jobs, and the best of all callings.
(John Newton, 18th century Anglican priest, in Carroll, 2006, p. 187)

Vocation is a fourth construct identified in the search for salient features of clergy review experience. The concept is often used to describe an employee encountering meaning and fulfilment in their work (Wrzesniewski, McCauley, Rozin, & Schwartz, 1997), and in Christian culture relates to a minister's sense of being called by God, the church, and the local congregation (Carroll, 2006). The denominations in this study have an ongoing role in developing and safeguarding human talent they have recruited and trained; issues of motivation and retention are critical as is the appropriate management of termination. The interface between denomination and individual minister has common features in Baptist and Presbyterian churches:

1. Candidating and selection – both churches use prayer and discernment, require tertiary academic study, and rely on interviews, observations, assessments, references and psychometrics to test the call.
2. Theological training and pastoral internship – both traditions assist new graduates to find a good match of pastor and parish, though neither church guarantees a placement.
3. Ongoing monitoring and mentoring, regulated nationally in both traditions - Presbyterians apply mandatory Certification of Good Standing and Ministry Development Reviews, while Pastor Registration and pastors' clusters provide a structure for accountability in the Baptist movement.

Baptist frameworks specify levels of attendance at Baptist events and clusters as a component of vocational identity, but Presbyterian regulations do not seem to measure attendance at the local Presbytery. For both churches, risk management factors like compulsory police checks and pastoral codes of ethics are managed nationally, and applied locally. If a ministry appointment is to be terminated, denominational leaders in both traditions are concerned that the process is managed appropriately. The Vocation construct draws attention to ways reviews have strategic value for parishes and denominations, how they impact motivation and how they might be used to address incompetence.

6.5.1 Strategic Value

Performance Management and Evaluation is one link in the chain of strategic HR practices that denominations apply to equip and safeguard human talent in whom they have invested. Along with a concern to evaluate theological competence and pastoral

prudence, and to identify fruitful areas for training or practice, PME is a tool that can signal what the organisation values (Berlinger, 2010; Zech, 2010). The business paradigm of Best Practice is difficult to apply in churches, which like small firms, need a “Pick and Mix contingency approach” characterised by flexibility and driven by day to day priorities. (Nadin & Cassell, 2007, p. 421; Roehling et al., 2005). The trained reviewers of the Presbyterian programme use only some of the ingredients of a corporate performance appraisal, relying more on education models that are 90% formative (C. Wright et al., 2013). Although there are some concerns about language, follow-up and reviewer quality, this study found the programme is accomplishing what it set out to do, by affirming achievement and identifying development paths. Baptist reviews that relied on locally-developed business models of performance management seemed less successful than those that were more conversational, though in both cases having people with workplace experience of appraisals enhanced the clergy experience. The Baptist Union is now placing increased emphasis on national frameworks for child safety, pastor accountability and lifelong learning. Clearer protocols about the timing and scope of pastor reviews could be usefully added to the registration framework; the prerequisites for pastor registration already specify lines of accountability and a review process, but this is omitted from the application form (Baptist Churches of New Zealand, 2015b). The use of an outside facilitator is a clear advantage (Hudson, 1992).

Churches today prioritise careful recruitment of leaders. The “uncommon” characteristics required for ministry include “a divine calling, a thick skin, a sense of humor, and a stubborn streak” (M. Smith & Wright, 2011, p. 83) but new competencies are needed as society changes to a voluntarist culture (Hudson, 2004; Johnston, 2012). Presbyterian ministry internships integrate “theological understanding, personal development, ministry skills, leadership gifts and Christian spirituality” (Knox Centre for Ministry and Leadership, 2015). Carey Baptist College trains leaders in “developing teams, managing conflict and change, emotional intelligence, pastoral care, and leading into mission” (Carey Baptist College, 2015). Both denominations use psychological testing to assess self-awareness, strengths, deficiencies, gifts and temperament, and medical certification that includes conversations about eating habits, exercise and stress. Multicultural awareness, and knowledge of other church traditions are considered desirable; commitment to social justice might be evaluated as an understanding of Treaty partnership and gender equity. These characteristics have ongoing application in professional development.

McKenna (2002) warns that competencies cannot easily be identified and objectified in performance management of knowledge professionals. Whiler many ministry evaluation models do explicitly include theological competency and spiritual awareness (Berlinger,

2003; Nygren, Ukeritis, McClelland, & Hickman, 1994; Rendle, 2002), changing ministry roles call for new administrative skills, for recruiting, training, and supervising staff, and coordinating volunteers (Beal, 2010). However the main changes are not so much in management skills, but in the vision and change competencies already described as key to leading a 21st century church (Hudson, 2004). Ammerman, a congregational-change researcher, identified a meta-cognitive competency she called “theologically-based understanding in using other skills” which could significantly undergird ministry flexibility in the changing social milieu (conversation with Nancy Ammerman, 1999, reported by Berlinger, 2003). “Using power for the good of others” is another leadership skill that incorporates organisational values (Berlinger, 2010). Rendle (2002) describes today’s ministers as custodians of meaningful texts and mindful practices, and calls them to bring an alternative prophetic imagination to common experience.

Competence is however highly contextual, complex and mysterious, and a more useful approach seeks to develop a behavioural repertoire, rather than specific competencies (McKenna, Singh, & Richardson, 2008). The PCANZ Ministry Development framework outlines such a competency bundle, while the Kenexa pastor review tool measures specific behaviours. Wright, in the Presbyterian reviewer manual, notes that clergy review is “theological, relational and strategic” (C. Wright et al., 2013, p. 7). By ‘strategic’ she means the enabling of a minister to move from a place of little awareness of vocational issues canvassed in a review, through awareness and attention, to a third level of strategic and intentional honing of advanced competencies. The increase in awareness and intentionality on the minister’s part is a form of professional development that provides valuable strategic advantage to the congregation (C. Wright et al., 2013). Despite reassurances that the MD programme is not summative, the Presbyterian church does use review as a normative strategy, in that any who decline to set up their review in a timely way are removed from the marriage list and cannot accept a call to a new parish (Presbyterian Church of Aotearoa New Zealand, 2015). The Baptist churches could consider adding similar constraints to the registration framework in an intentional upgrading of the value of clergy review (Baptist Churches of New Zealand, 2015b).

As well as having strategic value for the organisation, review can be a discernment tool for individual career decisions. Review can help the minister identify attitudes which hinder their work, or give an ‘outsider perspective’ on issues of culture and change, (C. Wright et al., 2013), but this study’s participants also used the experience as a discernment tool in a metacognitive way. Many of them applied the feedback to the question of the strength of the pastoral tie, what might be called fit or engagement in the HRM context. There was anxiety about being judged incompetent, and deregistered like a bad teacher; the “Imposter Syndrome” a fear that one will be unmasked as a fraud, is

commonly seen in the HRM sector (Vijay, 2006). Pastors spoke about not wanting to be the last to know they should go, and of giving serious consideration to how long they would stay in an appointment, even an open-ended one (Daniel, 2006). This question is ubiquitous; researchers report 50 - 100% of Protestant clergy questioning their call to their current pastoral setting (Burns et al., 2012; Carroll, 2006). It seems that review exercises are 'crucial', conversations where the stakes are high (Patterson et al., 2012). The Baptist Church Assessment Weekends of the 2000's sometimes precipitated pastor resignation (B2, personal communication, July, 2014).

Feeling both powerless and alone can undermine one's commitment to a mission, according to Schnase (2012) who recommends protecting the call with spiritual disciplines or a pastoral mentor. However he does not sense that the feedback and encouragement of the faith community, itself, might contribute to one's decision to stay in a place or move on. Avi's Baptist congregation provides him with more certainty by, at his request, polling members every five years as to whether he should stay; both pastor and people understand this to be a means of divine guidance. By contrast, many Baptist participants did not expect to see God at work in their conversations with elders, or individual and congregational reviews, despite the Baptist polity that locates God's surveillance and wisdom in the priesthood of the believers (Bolitho, 1993; Robson, 2013). The congregation's feedback on these matters is best processed privately in conversation with a trusted advisor, such as an outside reviewer (Burns et al., 2012). The subjective quality of member feedback, and the 'bell curve' of warmth towards the pastor, mean both compliments and criticisms need to be carefully weighed (Burns et al., 2012; McLean, 2000; Northern Baptist Association of Churches, 2013). Baptist pastors whose reviews do not involve an outside facilitator may seek instead to dialogue with their class group on their thoughts and prayers for the future.

6.5.2 Motivation

Safeguarding intellectual capital – leaders with vision, direction, and competence - is strategically important for denominations, because their investment in that individual talent will take years to recoup (Ulrich, 1998). By the time a pastor accepts a call to a local church, a good deal of time and money has been spent developing their potential, so retention is a strategic imperative for the sending organisation (Ulrich, Zenger, & Smallwood, 2013). Baptists noted that many of their Carey cohort have moved on to other vocations, and the Baptist Union acknowledges a shortage of quality people with the right mix of gifts and character to effectively lead a church (Weir, personal communication, 2015). The Presbyterian Church is declining numerically, and is not experiencing such a shortage of ministers or applicants for ordination (Weeks, personal

communication, 2015). However there is still a responsibility for the church as “employer” to support and steward its existing human talent (Zech, 2010).

Boxall’s version of the human ‘talent map’ categorises knowledge workers as stars, solid citizens, marginal performers and chronic underachievers (Boxall & Purcell, 2011, p. 191). Organisations wishing to retain their top performers need to invest time and energy in supporting and motivating them, because they may not actually know how well they are doing (Argyris et al., 2014). A clergy review is one way of embodying positive feedback, by expressing gratitude for past performance, building competence and commitment, and overcoming obstacles to future development (Argyris et al., 2014; Ulrich et al., 2013). This study demonstrated that it can also reveal concerns about pastor health and safety, and the possibility of workplace bullying; pastors usually disclose physical or verbal abuse, but more subtle forms of bullying like exclusion from meetings, impossible demands, interfering actions or unfounded private allegations also need to be challenged (Needham, 2003). Schmidt recommends that ministers-in-training be prepared for these dehumanising eventualities, and for “well-intentioned dragons” who undermine their leadership (Schmidt, 2013; Shelley, 1985).

In the business context, the annual review is often used as the trigger for a pay increase, but Baptist and Presbyterian stipends are constrained by national guidelines. In 2015, the Baptist standard for a probationary pastor was \$43,245.00, while Presbyterians pay \$46,457.00 to a beginning minister; both salaries are annually adjusted for cost-of-living and can be augmented by seniority increments, taxable housing allowances, and non-taxable reimbursements (Baptist Union of New Zealand, 2015; Sweeney, 2015). Presbyterians are not allowed to pay below stipend, though ministers sometimes subsidise a small church by not claiming reimbursements; Baptist churches can, and do, pay below the recommended rate, according to parish finances and local traditions. There is room to move upwards, but information about increments paid is not in the public realm. As talented professionals with transferable skills, clergy are clearly not “in it for the money”, and in fact the “sacrificial embrace” of ministry incurs a subtle economic cost (Peyton & Gatrell, 2013, p. 104). None of participants in this review mentioned being concerned about their stipend, in contrast with the complaints about remuneration revealed by the English study (Peyton & Gatrell, 2013). Reasons for avoidance of this theme could include ministers feeling that Christians do not talk about money, that review is not the occasion to negotiate pay, or that they were content with the modest pay they were receiving (Schmidt, 2013). However, clergy have expressed alarm when they perceive pay is not equitable; in 2006, the Presbyterian Church undertook a stipend review in response to widespread concerns, and raised stipends by an achievable increment (Presbyterian Church of Aotearoa New Zealand, 2006).

By contrast with the business sector, opportunities for pay increases or promotion in parish ministry are limited (Berlinger, 2010; Peyton & Gatrell, 2013). Churches must largely rely on intrinsic motivation - the drive to do something interesting and challenging - to keep ministers committed and engaged (Peyton & Gatrell, 2013; M. Smith & Wright, 2011; Ulrich, 1998). Where others might get sufficient affirmation via bonuses like money, benefits or status, affirmation for clergy often comes in less tangible ways (Peyton & Gatrell, 2013). Extra money does not necessarily build commitment; Southwest Airlines, for example, augment acceptable pay with recognition and team spirit to produce a committed workforce (Collins, 2005; Ulrich, 1998). Adroit use of non-monetary incentives such as public praise and/or encouragement can strengthen motivation in the Not for Profit context (Pink, 2009). Churches can learn from social sector organisations that reward valued workers with recognition of birthdays, snacks, parking spaces, tuition or gym fees, and the ability to use sick leave for care of elderly parents (Douglas, 2012 and Gilkison, personal communication, 2015). Churches can also reframe the terms of call, by applying idiosyncratic “job sculpting” that values what is important in the minister’s own life and family (Luecke, 2006, p. 27). The empowerment of ministers to contribute to the draft review report is also a source of intrinsic motivation (G. E. Roberts, 2003). However Baptist reviews are not always formally documented, and some participants note that clarifying terms of call and congregational expectations is difficult if no one records what was said. The outcome of an effective review conversation will be documentation that strengthens intrinsic motivation and the engagement between the organisation and the individual (Hudson, 2004; Kouzes & Posner, 1999).

6.5.3 *Incompetence*

The need to deal with marginal or poor performers is also a strategic concern (Boxall & Purcell, 2011). Sometimes ministers who were once well-qualified have failed to learn new skills and adapt their style to a changing context (Ulrich, 1998). Presbyterian reviewers are advised they should not fail to act if they discern that the ends of ministry are not being served, and to look out for a significant disconnect, lack of insight or serious misjudgement (C. Wright et al., 2013). As well as the special regulations invoked for “conduct unbecoming of a minister” - cases of immoral or criminal behaviour - there are provisions in the review programme for consulting with the Presbytery Moderator or the regional HR Committee; if the concern is serious they may override confidentiality (C. Wright et al., 2013). No minister in this study knew if, and when, this has ever happened, and even those who serve on Presbytery committees were not sure how they would respond; Hannah asked, “what sort of conversation would the Moderator have?” Review

findings are private, but in a climate of trust and transparency, ministers need to know that their colleagues are being kept accountable. The old Quinquennial Visitation occasionally had to dissolve a pastoral tie, but Presbyteries endeavoured to do so in a confidential and caring manner, that kept open the possibility that the minister might fit better somewhere else. This study revealed Presbyterians' concerns that privacy legislation and confidentiality contracts could mean marginal performers are being supported beyond a reasonable level, and that 'the ambulance is still at the bottom of the cliff'.

Business wisdom advises that performance appraisal of the churches' high-value heuristic workers should be aimed at development, and not applied to issues of discipline, removal, incarceration, or institutionalisation (Berlinger, 2010). While a review report may be useful for documenting concern, churches "cannot rely on performance appraisals to protect us from scandals such as sexual or financial abuse" (Berlinger, 2010, p. 86). Several participants warned that clergy review cannot be expected to identify criminally-inclined ministers. Ideally problems will be discovered before they become scandals, but either way, they should be handled outside of the appraisal system (Berlinger, 2010). But what happens when the review reveals the pastoral tie is unacceptably fragile or the minister is incompetent? Many Presbyterians asked this question; Baptists didn't have to because they knew what had happened to others – forced termination at the local level.

A 'hire and fire' mentality is part of the organisational culture in many businesses and some churches; one participant described elders whose leadership was informed by quick-turnover labour relations in compliance-based farm jobs (Lepak & Snell, 2002). Pfeffer (1998) names 'employment security' as the first of seven practices of an effective organisation, and insecurity about the future did influence Baptist pastors' response to an appraisal experience. American Baptist pastors are reportedly being fired by their congregations 116 times a month (Beasley-Murray, 2015a), and this study revealed that some Baptist churches in New Zealand are known for "killing" their pastors. The Presbyterian system has more layers of protection and advocacy, but fear was still a feature of evaluation. Performance standards are widely applied today, and many church members are familiar with business language like KPI's. They are becoming more specific in their expectations of a pastor, and more likely to initiate a termination if those expectations are not met (Croucher, 2015). Luecke (2006) notes that in many businesses, the policy is "sack the slackers," unless you can move them into a more suitable role or coach them into better performance. When ministers prove inadequate to the task, both moving and coaching should be attempted before sacking. However there are times when "an unacceptably low standard of performance" means the call

must be terminated (Baptist Churches of New Zealand, 2014b; Presbyterian Church of Aotearoa New Zealand, 2014, p. 92 Appendix 3-A). Zech notes, however, that firing a minister is the “nuclear option”, only to be used in extreme circumstances (Zech, 2010, p. 110) .

Ministers under ‘Terms of Call’ are not subject to the protections of the NZ Employment Relations Act (2000), but they still deserve to be treated fairly. In the UK, a natural justice approach treats Anglican clergy as if they were subject to British employment legislation, e.g. gender equity laws (Greene & Robbins, 2015). The NZ Baptist Handbook advises churches dismissing a pastor to treat them with fairness and dignity, explain the concerns that have led to termination, and access independent mediation (Baptist Churches of New Zealand, 2014b, Appendix 3-A). Even though the law is clear that the ERA does not apply, the guidelines counsel pastoral concern for the minister and their family in a difficult and stressful time. The Presbyterian Book of Order has comprehensive regulations for justly ending a ministry settlement (Presbyterian Church of Aotearoa New Zealand, 2014). Comparing the Baptist and Presbyterian experiences, it seems the main concern of the Presbyterians is for the clergy review not having enough ‘teeth’, whilst the Baptists are more anxious about ‘teeth’ that are used too freely. Either way, there is room for the denominations to take a more proactive role in guiding churches contemplating termination of a pastoral call. An Australian support group for ministers after termination reports that only 55 percent returned to church-related vocations (Croucher, 2015). Except in the most extreme circumstances, this is a waste of valuable human talent.

6.6 Summary

Today’s ministers are knowledge workers, valuable human resources that a shrewd manager will protect and preserve. Their intellectual capital is a product of competence and commitment, and is a matter of strategic significance to Baptist and Presbyterian churches (Ulrich et al., 2013). An effective ministry development review is said to be 90% formative (C. Wright et al., 2013), but this study demonstrates how collaborative leadership, missional imagination and vocational management are also key dimensions that need to be taken into account in clergy review conversations. Denominations should continue to recruit people who are self-motivated, collaborative and insightful, but they also should find ways to sustain their call and nurture their souls. A Harvard Business author offers pertinent advice for managing valuable human talent:

“Don’t smother them with rules or give them too short a leash...Point them in the right direction, support them with appropriate resources, and give them periodic praise and rewards, and they will get the job done.”

(Luecke, 2006, p. 32).

A realistic and hopeful review has the potential to do all of that.

7. Conclusions and Recommendations

The Clergy Review study explored ministers' experiences of being reviewed, and their perspectives on how evaluation and reflective learning are being addressed in two strands of the New Zealand church. An interpretive paradigm and Grounded Theory methodology were utilised to identify and interpret the social and ideal realities of 15 Baptist and Presbyterian clergy through the question, *"How is Performance Management and Evaluation understood in churches and what are the salient features of ministers' experience of clergy reviews?"* This research has significance for individual ministers and local churches as they plan and critique their evaluation procedures, but also for the denominations they represent, in understanding how review can have strategic importance in managing valuable human talent. In Chapter 2, the local Christian church was introduced as a form of non-profit organisation that contributes to intellectual, social and emotional capital in the congregation, and the wider community. The tasks that authorised church leaders undertake were described as heuristic labour in a turbulent environment where self-management, teamwork and creativity are key factors. The Presbyterian and Baptist pastors and ministers interviewed in this study do not see their role as 'a job' but rather an all-encompassing 'calling' that guides their work and provides a spiritual lens through which to interpret their experience (Burns et al., 2012; Carroll, 2006). Although ministers in New Zealand are similar to employees, especially professional knowledge workers, this study explains how the terms of call on which Baptist and Presbyterian ministers are appointed is not an employment relationship (Burt, 2012).

Pastors and priests are multitasking professionals who need to be "skilful managers, active listeners, relationship builders, effective communicators, problem solvers, planners, delegators, change agents, shepherds, inspirers, multi-taskers, servants and students" (Schmidt, 2013, p. 31). However societal change means the context is undulating terrain, where postmodern individualism, privatism, pluralism, relativism and anti-institutionalism mean the local church is no longer at the centre of the public square (Johnston, 2012; Potter, 2014; Ward, 2013). Christian communities are having to embrace deep change as leaders become more innovative and relevant in connecting people with God. Clergy research literature shows these challenges are leading ministers to doubt their call and exit the ministry through burn-out, drop-out and being kicked out; participants in this study reported inadequate management and insufficient support resulting in unreasonable demands, few rewards, dysfunctional teams, maintenance mind-sets, and workplace bullying.

7.1 Business and Church

A two-stage review of relevant business and church leadership literature revealed that the context of church ministry is very different from that of a commercial organisation (Messina, 2007). This thesis explored the question of how business wisdom and HRM tools might fit with the practice of clergy review as experienced by parish ministers. The discipline of Performance Management and Evaluation was explained in terms of bundled systems of established practices, including individual appraisal which aims to identify employee strengths, limitations and development needs so as to improve effectiveness. However many HR professionals in the knowledge economy have lost confidence in traditional performance appraisals; they are changing focus from an evaluative manager interview to a more participative feedback and 'coaching' conversation (Culbert, 2010; Levy & Williams, 2004; Pulakos et al., 2012; Steinkellner, Elfriede, & Guenter, 2011). They see these conversations being of key strategic value in talent management, the ability to generate enviable performance by using bundles of practices that protect and develop valuable employees. Talent Management is explained as an investment in the future that is increasingly relying on performance management practices that are agile, collaborative and shaped by context. Such contingent review conversations were in this study shown to be relevant to evaluation of ministers who are largely self-managing, knowledgeable and committed.

Timetabled review and professional registration frameworks can work together to assist denominations to manage the intellectual, emotional and social capital that resides in church ministers. Policy documentation revealed that Presbyterians have a national level of governance, and bundle together mandatory Ministry Development Reviews and certification of Good Standing in a three-year cycle. Baptists cannot mandate timing and conduct of reviews, but they collaborate in a two-year nationally-monitored cycle for Pastor Registration, and formative Development Plans for Lifelong Learning; they leave pastor Reviews to the local congregation. Thus, the Baptist and Presbyterian movements in New Zealand both use review, registration and ongoing learning to supervise pastors, and to encourage ministry development goals that reflect organisational values and enhance individual performance.

In-depth interviews enabled description of the ministers' experience, and interpretation of the policies and practices of the churches involved. The interview findings and analysis shaped an emergent theoretical model which views effective clergy review through the lens of conversation, dialogue where people come to understand their differences, and collaborate in sharing expectations and shaping goals. A 'fireside chat' is not enough; the stories told by pastors confirm that proper preparation, processes, and protections

must be in place to avoid subjective surveys that can have unintended consequences. These are conversations that have the potential to be “crucial” - discussions where stakes are high, opinions vary, and emotions run strong (Patterson et al., 2012, p. 2). There is rigour to be learned from the business sector, and the study showed that thoughtful timing, predictable structure, relevant reporting and trained reviewers all mattered to Baptist and Presbyterian ministers. An HRM lens revealed issues with the intangible nature of ministry work, the subjectivity of member feedback, and the skill-shortfall in those implementing PME practices with clergy.

There is, however, a danger in seeing that Performance Appraisal, as practised by Human Resource managers in the corporate sector, is the key to robust evaluation and growth. When Collins (2005) applied his ‘Good to Great’ project findings to the social sector, he rejected the assumption that the path to greatness is for NFP to become more business-like. Organisations in the social sector are in need of structure and discipline, but rigidly emulating business practices may not be the path to greatness, since the tools of business are blind to many of the church’s tasks (Hofmans-Sheard, 2002). Human Resource ‘best practices’ applied in churches are not able to prevent scandals, laziness and mismatched pastoral placements. For the social sector, the economic driver is not finance alone, but resources of all kinds – money, time, and emotional commitment. Greatness will come when “hands, hearts and minds” are harnessed effectively for the shared mission (Collins, 2005, p. 2). That sounds like talent management. What is needed is an ongoing and in-depth collaboration that brings together the riches of the Church’s tradition, and the wisdom of the business world in managing the valuable human talent that is the Christian clergy (Zech, 2010).

7.2 Pastoral Tie Model

At the core of a Grounded Theory Methodology analysis is the goal of building a theory, a coherent framework that will have disciplinary utility, contribute to the academic literature, or just provide a researcher with the delight of constructive theory. A shape constructed from the codes distilled from the participants' data could suggest causes and connections in realistic and hopeful reviews, and inform HRM practices in churches. The idea of a graphic came from a Grounded Theory study where the authors co-opted a colleague to draw their theory, and found the painting she produced enhanced their understanding of the constructs and opened up new possibilities (Giske & Artinian, 2007).



Figure 5: The Pastoral Tie
Clergy Review Study, 2015
Concept VF Coleman, Artwork C Mitchell

The Pastoral Tie graphic presented in Figure 5 was drawn by a friend in response to my describing to her my own vision of Celtic-inspired array of ribbons, for which I had found graphic software representations inadequate. This was indeed “discovery” - the archaeologist constructing a hypothetical house on the codes excavated from my participants' data – see Figure 3.

The central construct of Conversation was used to describe the participatory nature of these reviews, and to view evaluation of clergy performance through an organisational lens. Four other relevant constructs are portrayed as fields surrounding the Review Conversation nexus; they were explored separately in the Discussion but the Celtic-inspired ‘Pastoral Tie’ graphic makes it clear that these features are looped and intertwined, and there is an interweaving of pairs in their influence in congregational life. The model is used to describe how reviews can function as effective instruments for both managing valuable human talent (organisational level) and testing the pastoral tie (individual level). The model is also useful for examining the problematic features of reviews, and the unhelpful approaches which focus on the urgent and measurable in favour of the intangible but imperative contributions of pastoral leaders. When confidential, timely reviews are both realistic and hopeful, they can function to support ministry effectiveness and longevity, and help answer important organisational questions about the present and the future. The four salient features describe practices that can engage, retain and develop valuable human talent in both denominations.

A review conversation allows evaluation to take place within a trusting relationship where problems are perceived as objective issues to be solved rather than personal inadequacies to be addressed. Within that strategic conversation, which can include normative, formative and restorative dimensions, key issues of vocation, formation, collaboration and imagination can be identified and explored. This study has shown how the central construct – conversation – helps explain overall experiences of review, and the endorsements and concerns expressed by the clergy of both streams. The second construct, Formation, connects review with spiritual and psychological learning and growth. Collaboration between elders and ministers in conducting and responding to a review is also important, and the fourth section looked at how review contributes to the pastor’s Imagination, in leading vision and managing change. Fifthly, the role of the review in shaping a minister’s sense of Vocation is significant, as well as organisational strategies to recruit and retain valuable human talent.

The interconnections of the salient features are represented in Table 6. The centre knot is made up of two ribbons, one stemming from history and the other from geography. History (and the denomination) provide the minister, with two strands of personal vocation and ongoing formation. Geography contributes the local parish, where minister and people exercise collaboration and imagination in discerning and executing their God-given mission. Vocation is looking *back*, Formation is looking *in*, Collaboration is looking *between*, and Imagination is looking *forward*, while the holistic review conversation will look *all around*. History and Geography are intertwined in the specific call of a pastor to

a parish; the nexus or knot at the centre of the image signifies the engagement between pastor and parish, and represents the centrality of the testing of that call in ministers' self-reflection and in this sample's review experience.

Review is a way to develop	Vocation, Formation, Collaboration and Imagination
Review is a way to assess	Vocation, Formation, Collaboration and Imagination
Vocation, Formation, Collaboration and Imagination	are by products of Review
Vocation, Formation, Collaboration and Imagination	are key competencies in Review
Vocation, Formation, Collaboration and Imagination	are salient features of Review
Vocation and Formation	are connected by Denomination
Collaboration and Imagination	are connected by Location
Formation and Collaboration	are connected by Looking Around – the present
Vocation and Imagination	are connected by Looking Ahead – the Future

Table 6: Identifying relationships between theoretical constructs.

The interface of Formation and Collaboration is seen in the concept of a learning organisation, where Christian formation is not just a matter for the individual pastor, but something that is embraced by everyone in the church - a culture of formation (Alphen, 2010; M. K. Smith, 2001). Collaboration and Imagination overlap when the congregation is seeking to discern its vision of a shared desired future, in conversations where the “collective wisdom feels magical” (Brown & Isaacs, 2005, p. 210). Imagination and Vocation work together when mission priorities in the “present future” to shape organisational change, planting new congregations and fresh expressions of faith (Norton, 2015). Formation and Vocation intertwine as the churches take responsibility to equip, monitor and support the clergy they have sent out in ministry (S. Jones, 2008). Formation and Collaboration represent the now, Vocation and Imagination the future.

The four salient features identified in this study were found in both denominational contexts but there were subtle nuances. Baptist churches' independence and autonomy can mean they are unhealthily isolated from outside scrutiny; limited understanding of issues of justice and ethics can lead to unsafe decisions. Baptist pastors may face unreasonable conflicting expectations, and brutally critical eldership teams, when what they most need is to know they are loved and supported. In Presbyterian polity, collegiality is essential because it “reflects spiritual gifts, protects the leadership from narrow horizons, allows for integration of special interests, limits individual power and compels the leaders to dialogue” (Vischer, 1992, p. 84). However with large presbyteries and fewer experienced clergy, time and resources may not be as dedicated to pastoral and judicative roles, and reciprocal trust and transparency may be compromised. A comparison of Baptist and Presbyterian experiences suggests that the main concern of

the Presbyterians is for the clergy review not having ‘teeth’, whilst the Baptists are more anxious that ‘teeth’ are used too freely. Either way, there is room for the denominations to take a more proactive role in guiding Human Resource Management. in the church. When confidential, timely reviews are both realistic and hopeful, they can function to support ministry effectiveness and longevity, and help answer the important organisational questions about the present and the future.

This study’s key finding is that clergy review is strategic, both for the individual and the organisation; reviews can be effective instruments for both managing valuable human talent (organisational level) and testing the pastoral tie (individual level). The salient features of Collaboration and Formation will maintain skill and commitment, while Vocation addresses the wider goals of engagement and alignment. Imagination is more mysterious, but dimensions of flexibility and hope are key to organisational success in a changing world. In clergy work these features are difficult to measure, but the chief tool that makes for mutual learning is still Conversation that enables people to feel valued, involved and trusted (Rendle & Mann, 2003; Zech, 2010) The theoretical model is a useful template for critical reflection on a minister’s work and a church’s mission, and offers a perspective on congregational engagement, for a minister questioning their ongoing call. The reading and original research has supported the claim that the most important feature of a social sector organisation is the quality of its human resources (Kamaria & Lewis, 2009).

7.3 Trustworthiness and Limitations

Undertaking original grounded theory research always entails paying serious thoughtfulness to two questions in the researcher’s mind - will the findings be trustworthy? And will the theory have disciplinary utility? In response to the first, it must be acknowledged that positivist notions of validity and reliability are a poor fit with qualitative research (Thorne, 2008). The epistemology applied in this study acknowledges that the subjective concerns of a researcher will have influenced the findings and shaped the conclusions. Grounded theory exponents know that data is constructed from many sources; the participants own words are the necessary foundation but are reframed through researcher analysis and interpretation (Strauss and Corbin, 1997). That does not mean they do not represent truth, from a Critical Realistic viewpoint, and that the model is not worthy of wider application. Critical Realists use conversations to “make meaning out of our pasts, to imagine possible futures, and to form cooperative practices”, without needing to engage with larger ontological debates about what is really real (Branson, 2004, p 36). My qualitative interpretive approach listened to voices other than the dominant management paradigms and sought to help

churches to be better informed of the subjective implications of review processes and outcomes for ministers (McKenna et al, 2008).

The research design employed widely-applied methodological controls to limit researcher bias and increase theoretical saturation (Charmaz, 2014). Accurate transcription kept faith with the participants' stories, and generous servings of verbatim quotes introduced their wit and intelligence to the reader (Gibbs, 2007). There was a close fit between findings and constructs, providing "a sound empirical base" for the theoretical connections (Dey, 1993, p. 255). Other interpretations are possible, but constant comparison, noting exceptions and corroborative chains of evidence all contributed to an account that may be deemed trustworthy (Urquhart, 2013). As researcher, I had determined to remain committed to an 'open mind', and so did not embark on reviewing relevant literature in depth until after I had conducted the interviews (Urquhart & Fernández, 2013). I was inspired by the GT coding methodology, and delighted by the emerging theory, which bore no resemblance to any model I had previously explored in my ministry work or academic reading. I employed both logical reasoning and intuitive leaps in my interpretive journey, and was intrigued to find how my retrospective literature review supported the overlapping categories and constructs I had generated.

In response to the second question, concerning generalisability and utility, it must be acknowledged there are limitations to this research. The sample is small and comprised of volunteers, and some others who were purposively recruited to fill demographic gaps. The denominations selected are similar in polity and values, but the different structures and assumptions in other traditions like Catholic or Anglican might mean similar interviews with those clergy would not reflect the same concerns. However the findings do reveal consistency with other projects such as the Resilient Minister research, which I did not discover until data analysis and theory-building were complete (Burns, Chapman & Guthrie, 2012) (Burns, Chapman, & Guthrie, 2012). That, and the fact that the interviews were participant-driven, indicates a good probability that the findings are accurate (Gibbs, 2007; Thorne, 2008). Schmidt's (2013) clergy study acknowledged the particular risk of interpretive bias when the researcher has poor knowledge of the context, or when the participants have difficulty articulating their thoughts; the ministers in this study were, like Schmidt's interviewees, educated and articulate, professional public speakers, and they spoke with transparency and spontaneity using language and concepts that I understood well.

Undertaking original grounded theory research always entails paying serious thoughtfulness to two questions in the researcher's mind - will the findings be trustworthy? And will the theory have disciplinary utility? In response to the first, it must be acknowledged that positivist notions of validity and reliability are a poor fit with qualitative research (Thorne, 2008). Grounded Theory exponents know that data is constructed from many sources; the participants' own words are the necessary foundation but are reframed through researcher analysis and interpretation (Strauss & Corbin, 1997). My Critical Realist approach sought to listen to voices other than the dominant management paradigms, and to help churches be better informed of the subjective implications of review processes and outcomes for ministers (McKenna et al, 2008). I was delighted by the emerging theory, which bore no resemblance to any model I had previously explored in my work or study. I employed both logical reasoning and intuitive leaps in my interpretive journey, and was intrigued to find how my retrospective literature review supported the overlapping categories and constructs I had generated.

In response to the second question, concerning generalisability and utility, the limitations to this research need to be recognised. The sample is small and comprised of volunteers, and others who were purposively recruited. The denominations selected are similar in polity and values, but have quite different structures from other traditions like Catholic or Anglican. However the findings reveal consistency with other projects such as the Resilient Minister research, which I did not discover until data analysis and theory-building were complete (Burns et al., 2012). The ministers in this study were educated and articulate, skilled communicators; I am grateful for their trust and spontaneity, and hope the study does indeed have vocational utility.

7.4 Future Research and Recommendations

Strong theory delves into underlying processes and provides logical and interconnected arguments (Sutton & Staw, 1995). I am persuaded that the theory presented in this thesis is robust, and an interpretation that could provide the framework of an accessible guide for churches. The constructs could also provide a basis for further study; other researchers may pick up the paradigm and apply it to other denominations or localities. Specific themes such as gender or ethnicity could be studied more intentionally; one could hypothesise for example that a hierarchical culture like that of many Korean Christians might yield different results about accountability and support. Even within New Zealand a mixed methods exercise of surveying larger numbers of clergy about their experience of the five theoretical constructs might usefully augment the qualitative data. Church reviewers might use the model as framework for a model Clergy Review, and a helpful template could be provided by the denominations.

Theories do not have to have predictive power in order to offer suggestions worth pursuing (Dey, 1993). To that end, I offer three concluding recommendations:

1. The PCANZ is to be encouraged that the Ministry Development Review programme is evaluating and reassuring ministers in a largely-formational model that is steadily gaining acceptance. There are areas where some fine-tuning could improve the experience, and attention could usefully be paid to reviewer/report moderation, presentation and language, as well as clarity about effective follow-up. Presbyteries could sponsor more class reunions, cluster groups and minister-only days to build collegiality. As noted in the discussion, a gathering of reviewers for refresher training could helpfully include a collaborative project to simplify language, reframe scriptures, and align reporting protocols.
2. The Baptist Churches of New Zealand are to be affirmed in the recent addition of a more robust learning component to the registration framework, and the Union is encouraged to explore how mandating regular clergy review with an agreed template and an outside facilitator could also enhance pastor engagement and retention. Congregational leaders of both traditions could benefit from Learning Cycle workshops, such as those offered by Berlinger in the US, where skills like creative listening, reflective observation and perspective taking are taught. Training in Motivational Interviewing would be an asset for Baptist leaders who facilitate clergy reviews.
3. Both denominations could benefit from exploration of more effective ways of supporting ministers experiencing burnout and depression, and from identifying inadequate theologies of pastor mental health and illness where they are expressed in member churches.

A Wellington art critic recently suggested that a review is an “act of engagement, an act of love” (Rosabel Tan, interviewed by Gregory, 2015). Clergy review has the potential to be given and received that way. Congregational researchers recommend viewing the men and women who promote and model gospel culture in their own organisation, and provide leadership in the churches’ delivery of social capital to the wider community, as valuable human resources (Ammerman, 1993; Carroll, 2006; Rendle, 2002). As such they are worthy of affirmation, investment and protection, like the knowledge workers of the corporate sector. By integrating formation, collaboration, imagination and vocation, effective Clergy Review:

- engages pastor and people in a useful focused conversation
- reveals the quality of the pastoral tie
- enhances the capacity for envisioning the future
- points to ways the relationship might be strengthened, and
- provides a timely warning to pastor, people and denomination when engagement is at risk.

Appropriately-nuanced ministry review processes are an aspect of PME that can encourage a generous collaborative culture, affirm quality leadership, and, when necessary, enact robust consequences. Review conversations can build organisational effectiveness and protect valuable human resources, in ways that are both realistic and hopeful.

References

- 6, P., & Bellamy, C. (2012). *Principles of methodology: research design in social science*. London, UK: Sage.
- Alphen, J. (2010). Performance management and ongoing formation of priests. In C. E. Zech (Ed.), *Best practices in Catholic church ministry performance* (pp. 91-104). Plymouth, UK: Lexington.
- Alsop, A. (2013). *Continuing professional development in health and social care: strategies for lifelong learning*. Retrieved from <http://www.ebilib.com>.
- Alvesson, M. (2003). Beyond neopositivists, romantics, and localists: a reflexive approach to interviews in organizational research. *The Academy of Management Review*, 28(1), 13-33.
- Ammerman, N. T. (1993). S.B.C. moderates and the making of a postmodern denomination. *Christian Century*, 110(26), 896 - 899.
- Ammerman, N. T., & Farnsley, A. E. (1997). *Congregation and community*. New Brunswick, NJ: Rutgers University Press.
- Argyris, C. (1991). Teaching smart people how to learn. *Harvard Business Review*. Retrieved from <https://hbr.org/1991/05/teaching-smart-people-how-to-learn#>
- Argyris, C., Armstrong, S., Baskette, P., Briggs, A., Christiano, R., Grossman, J., Harris, J., Higgins, J., Manzoni, J-F., Plotkin, H., & Smith, D. (2014). *Giving effective feedback*. Boston, MA: Harvard Business Review Press.
- Atkins, A. (2010). *Employment bites: the bite-sized guide to better Human Resources*. Auckland, NZ: Harper Collins.
- Atkinson, P., & Silverman, D. (1997). Kundera's immortality: the interview society and the invention of the self. *Qualitative Inquiry*, 3(3), 304-325.
- Auckland Presbytery Ministerial Certification Task Group. (2008). *Towards a theology of ministerial registration*. Position Paper.
- Auckland University of Technology Ethics Committee. (2014). *Application for ethics approval*. Retrieved from http://www.aut.ac.nz/_data/assets/word_doc/0006/324645/Application-Form-EA1-092015.docx
- Azzone, G., & Palermo, T. (2011). Adopting performance appraisal and reward systems. *Journal of Organizational Change Management*, 24(1), 90-111.
- Baab, L. (2003). *Beating burnout in congregations*. Herndon, VA: Alban Institute.
- Baab, L. (2015). *Good listening is not enough to make a good conversation*. Retrieved from <http://www.lynnabaab.com/blog/good-listening-is-not-enough-to-make-a-g>
- Bailey, C. A. (2007). Coding, Memoing and Descriptions in *A guide to qualitative field research* (pp. 125-141). Thousand Oaks, CA: Pine Forge Press.
- Baptist Churches of New Zealand. (2014a). *About us*. Retrieved from <http://www.baptist.org.nz/general/>
- Baptist Churches of New Zealand. (2014b). *Administration manual V2014*. Retrieved from <http://www.baptist.org.nz/uploads/PDFs/Manuals/AdminManual.pdf>
- Baptist Churches of New Zealand. (2015a). *2015 Yearbook*. Auckland, NZ: Baptist Churches of New Zealand.
- Baptist Churches of New Zealand. (2015b). *Baptist leaders' registration*. Retrieved from <http://www.baptist.org.nz/leadersregistration/>
- Baptist Churches of New Zealand. (2015c). *Being a Baptist*. Retrieved from <http://www.baptist.org.nz/general/Being-a-Baptist/>
- Baptist Research and Historical Society, N. Z. (2014). *The digital Baptist 4.0: 135 years of Baptist life. [digital media]* M. Sutherland (Ed.)
- Baptist Union of New Zealand. (2004). Pastors review survey. Auckland, NZ.
- Baptist Union of New Zealand. (2014). The Treaty of Waitangi is a gift from God. Retrieved from <http://www.baptist.org.nz/news/32/22/The-Treaty-of-Waitangi-is-a-gift-from-God/>

- Baptist Union of New Zealand. (2015). 2015 annual review of stipend and allowances *Treasurers letter*. Auckland, New Zealand.
- Barney, J. (1991). Firm resources and sustained competitive advantage. *Journal of Management*, 17(1), 99-120.
- Beal, J. (2010). Performance management of Catholic clergy: "best practice" or new iconoclasm? In C. E. Zech (Ed.), *Best practices in Catholic church ministry performance*. Plymouth, UK: Lexington.
- Beasley-Murray, P. (1993). *Anyone for ordination?* Tunbridge Wells, UK: MARC.
- Beasley-Murray, P. (2015a). Leading God's people. In P. Beasley-Murray (Ed.), *Living out the call* (Vol. 2) [Kindle version]. Retrieved from Amazon.com.
- Beasley-Murray, P. (2015b). Living for God's glory. In P. Beasley-Murray (Ed.), *Living out the call* (Vol. 1) [Kindle version]. Retrieved from Amazon.com.
- Beasley-Murray, P. (2015c). *Ministers need to be accountable*. Retrieved from <https://www.paulbeasleymurray.com/blog/2015/03/ministers-need-be-accountable/>
- Berlinger, L. (2003). The behavioral competency approach to effective ecclesial leadership. *Journal of Religious Leadership*, 2(2), 91 - 112.
- Berlinger, L. (2010). Clergy performance management: an organisational psychology perspective. In C. E. Zech (Ed.), *Best practices in Catholic church ministry performance* (pp. 83-90). Plymouth, UK: Lexington.
- Birchfield, R. (2012). Being good at doing good. *New Zealand Management*, October 2012, 20.
- Bolitho, E. (1993). *Meet the Baptists: postwar personalities and perspectives*. Auckland, NZ: Christian Research Association of New Zealand.
- Bowater, J. (2008). *Appendix to Ministry Development Framework*. Wellington, NZ: PCANZ.
- Boxall, P., & Macky, K. (2009). Research and theory on high-performance work systems: progressing the high-involvement stream. *Human Resource Management Journal*, 19(1).
- Boxall, P., & Purcell, J. (2011). *Strategy and Human Resource Management* (3rd ed.). Basingstoke, UK: Palgrave Macmillan.
- Branson, M. L. (2004). *Memories, hopes and conversations*. Herndon, VA: Alban Institute.
- Bridger, F. (2003). *A theological reflection: guidelines for the professional conduct of the clergy* (pp. 13-20). London, UK: Church House.
- Brooking, K. (2006). Selecting a principal on merit or gender? *New Zealand Principals' Federation Magazine*, March 06, pp29-36. Retrieved from http://www.nzpf.ac.nz/sites/default/files/March06_Principal.pdf
- Brown, J., & Isaacs, D. (2005). *The world café: shaping our futures through conversations that matter*. [Kindle version]. Retrieved from Amazon.com.
- Brueggemann, W. (2001). *The prophetic imagination* (2nd ed.). Minneapolis, MN: Fortress Press.
- Bryman, A., & Bell, E. (2011). Research Designs in *Business research methods* (3rd ed., pp. 39 - 69). Oxford, UK: Oxford University Press.
- Buechner, F. (1993). *Wishful thinking*. New York, NY: Harper and Row.
- Burns, B., Chapman, T. D., & Guthrie, D. C. (2012). *Resilient ministry: what pastors told us about surviving and thriving*. [Kindle version]. Retrieved from Amazon.com.
- Burt, G. (2012). Pastors and Ministers - "Called" or Employed? Retrieved from <http://www.gazeburt.co.nz/files/docs/publications/pastors%20and%20ministers%20-%20called%20or%20employed.pdf>
- CAIRA NZ. (2015). *Professional pastoral supervision*. Retrieved from <https://cairasupervision.wordpress.com/>
- Candy, P. C. (2000). Reaffirming a proud tradition: universities and lifelong learning. *Active Learning in Higher Education*, 1(2), 101-125.
- Careers New Zealand. (2014). *Minister of religion*. Retrieved from <http://www.careers.govt.nz/jobs/community-services/minister-of-religion/>

- Carey Baptist College. (2014). *Lifelong learning for registration*. Auckland, NZ: Baptist Churches of New Zealand.
- Carey Baptist College. (2015). *Training leaders for ministry*. Retrieved from <http://carey.ac.nz/prospective-students/programmes-offered/leadership-training/>
- Carroll, J. W. (1991). *As one with authority*. Louisville, KY: Westminster/John Knox.
- Carroll, J. W. (2006). *God's potters: pastoral leadership and the shaping of congregations*. Grand Rapids, MI: Wm B Eerdmans.
- Charmaz, K. (1990). Discovering chronic illness: using Grounded Theory. *Social Science & Medicine*, 30(11), 1161-1172.
- Charmaz, K. (2011). A constructivist Grounded Theory analysis of losing and regaining a valued self. In F. J. Wertz (Ed.), *Five ways of doing qualitative analysis: phenomenological psychology, grounded theory, discourse analysis, narrative research, and intuitive inquiry*. New York, NY: Guilford Press.
- Charmaz, K. (2014). *Constructing Grounded Theory: a practical guide through qualitative analysis*. 2nd edition. Thousand Oaks, CA: Sage Publications.
- Chase, S. E. (2008). Narrative inquiry: multiple lenses, approaches, voices. In N. K. Denzin & Y. S. Lincoln (Eds.), *Collecting and interpreting qualitative materials* (pp. 57 - 94). Thousand Oaks, CA: Sage Publications.
- Cherniss, C., & Egnatios, E. (1978). Clinical supervision in community mental health. *Social Work*, 23(3), 219-223.
- Children's Workforce Development Council. (2007). *Providing effective supervision*. Retrieved from http://www.drugsandalcohol.ie/18884/1/Effective_Supervision_unit.pdf
- Christopherson, R. W. (1994). Calling and career in Christian ministry. *Review of Religious Research*, 35(3), 219-237.
- Chua, G. (2015). *Succession planning: the HAIR system*. Retrieved from <http://peoplecenter.org/wp/2015/01/16/succession-planning/>
- Church of Scotland Ministries Council. (2014). *Accompanied review chart*. Retrieved from http://www.churchofscotland.org.uk/__data/assets/pdf_file/0008/2969/accompanied_review_chart.pdf
- Cladis, G. (1999). *Leading the team based church*. San Francisco, CA: Jossey-Bass.
- Clement of Rome. (96). *The first epistle of Clement to the Corinthians*. Retrieved from <http://www.earlychristianwritings.com/text/1clement-lightfoot.html>
- Coleman, V. (2003). *The Eldership: yesterday, today, and forever?* (MTS) Research Essay. Tyndale Graduate School of Theology, Auckland. Retrieved from <http://knoxcentre.ac.nz/wp-content/uploads/2012/11/The-Eldership.-Yesterday-Today-and-Forever.pdf>
- Coleman, V. (2011). *The emergence of women as clergy in two New Zealand denominations with reference to current literature on gender and diversity*. Essay. Business School. AUT.
- Coleman, V. (2014). *Reflections on a research project*. Essay. Business School. AUT.
- Collins, J. (2001). *Good to great: why some companies make the leap...and others don't*. New York, NY: Harper Collins.
- Collins, J. (2005). Good to great and the social sectors: why business thinking is not the answer. Retrieved from <http://www.jimcollins.com/books/g2g-ss.html>
- Colthart, I., Cameron, N., McKinstry, B., & Blaney, D. (2008). What do doctors really think about the relevance and impact of GP appraisal 3 years on? A survey of Scottish GPs. *British Journal of General Practice*, 58(547), 82-87.
- Colvin, G. (2014). *Women make groups smarter*. Retrieved from <http://geoffcolvin.com/170/>
- Colvin, G. (2015). Q&A on 'Humans are underrated'. Retrieved from <http://geoffcolvin.com/qa-with-geoff-on-humans-are-underrated/>
- Cooperrider, D. L., & Whitney, D. (2005). *Appreciative inquiry: a positive revolution in change*. San Francisco, CA: Berrett-Koehler Publishers.
- Creswell, J. W. (2009). *Qualitative methods in Research design: qualitative, quantitative, and mixed methods approaches*. Thousand Oaks, CA: Sage Publications.

- Crocket, A. (2013). Exploring the meaning of the Treaty of Waitangi. *New Zealand Journal of Counselling*. Retrieved from http://www.nzac.org.nz/journal/4_exploring_the_meaning_of_the_treaty_of_waitangi_for_counselling.pdf
- Cross, F. L. (Ed.) (1958a) "Church" in *Oxford Dictionary of the Christian Church*. Oxford: Oxford University Press.
- Cross, F. L. (Ed.) (1958b) "Visitation" in *Oxford Dictionary of the Christian Church*. Oxford: Oxford University Press.
- Crotty, M. (1998). Introduction: the research process *The foundations of social research: meaning and perspective on the research process*. (pp. 1 - 17). St Leonards, NSW: Allen & Unwin.
- Croucher, R. (2015). *Forced terminations: when a church asks a pastor to leave*. Retrieved from <http://priscillasfriends.org/studies/terminations.html>
- Culbert, S. (2010). *Get rid of the performance review*. New York, NY: Business Plus.
- Culbertson, S. S., Henning, J. B., & Payne, S. C. (2013). Performance appraisal satisfaction: the role of feedback and goal orientation. *Journal of Personnel Psychology*, 12(4), 189-195.
- Daniel, J. (2006). When you're questioning your call. *Candour*(July 2006), 17-18.
- Daniel, J., & Marquand, G. (2006). Ministers under significant stress. *Candour*, 3(April 2006), 16 -19.
- Davys, A., & Beddoe, L. (2010). *Best practice in professional supervision: a guide for the helping professions*. London, UK: Jessica Kingsley Publishers.
- DelCampo, R. G. (2011). *Human Resource Management demystified*. New York, NY: McGraw-Hill.
- Denzin, N. K., & Lincoln, Y. S. (2008). Introduction: the discipline and practice of qualitative research. In N. K. Denzin & Y. S. Lincoln (Eds.), *Collecting and interpreting qualitative materials* (pp. 1 - 44). Thousand Oaks, CA: Sage Publications.
- Department of Labour. (2003). *Healthy work: managing stress and fatigue in the workplace*. Retrieved from <http://www.business.govt.nz/worksafe/information-guidance/all-guidance-items/healthy-work-managing-stress-and-fatigue-in-the-workplace/stressfatigue.pdf>
- Dey, I. (1993). *Qualitative data analysis*. London, UK: Routledge.
- Diocese of Auckland. (2000). *The annual ministry review: preamble*. Auckland, NZ.
- Diocese of Lincoln. (2006). *Ministerial developmental review: tools to prepare for review*. Retrieved from http://www.lincoln.anglican.org/media/1239/diocese_of_lincoln_mdr_toolkit_life_changes.pdf
- Douglas, E. (2012). *Monetary vs. non-monetary rewards: which are more attractive?* Retrieved from http://blogs.edweek.org/topschooljobs/k-12_talent_manager/2012/03/monetary_versus_non-monetary_rewards_which_are_more_attractive.html?print=1
- Drucker, P. F. (1999). *Managing oneself*. Boston, MA: Harvard Business School Press.
- Dunedin Methodist Parish. (2009). *Ministry review*. Retrieved from <http://www.dunedinmethodist.org.nz/events/view/ministry-review/>
- Dunlap, C. A. (2008). Effective evaluation through appreciative inquiry. *Performance Improvement*, 47(2), 23-29.
- Easum, W. M., & Bandy, T. G. (1997). *Growing spiritual redwoods*. Nashville, TN: Abingdon Press.
- Eastell, K. (Ed.). (1994). *Appointed for growth*. London, UK: Mowbray.
- Eisenhardt, K., & Graebner, M. (2007). Theory building from cases: opportunities and challenges. *Academy of Management Journal*, 50(1), 25.
- Equipping the Leadership Policy Group. (2004). *Report to PCANZ General Assembly 2004*. Wellington, NZ: PCANZ
- Fee, G., & Stuart, D. (2014). *How to read the Bible for all its worth*. Grand Rapids, MI: Zondervan.

- Fleetwood, S. (2005). Ontology in organization and management studies: a Critical Realist perspective. *Organization*, 12(2), 197-222.
- Fleetwood, S., & Hesketh, A. (2006). HRM-performance research: under-theorized and lacking explanatory power. *The International Journal of Human Resource Management*, 17(12), 1977-1993.
- Fleetwood, S., & Hesketh, A. (2010). *Explaining the performance of Human Resource Management*. E-book retrieved from <http://www.ebilib.com>.
- Fontana, A., & Frey, J. (2008). The interview: from neutral stance to political involvement. In N. K. Denzin & Y. S. Lincoln (Eds.), *Collecting and interpreting qualitative materials* (pp. 115 - 160). Thousand Oaks, CA: Sage Publications.
- Ford, J. D. & Ford, L. W. (2009). Decoding resistance to change. *Harvard Business Review*, 87(4), 99-103.
- Forte, J. (2014). *Power of positivity: use appreciative enquiry to improve engagement*. Retrieved from <http://humancapitalist.com/power-of-positivity-use-appreciative-inquiry-to-improve-engagement/>
- Foster, R. (1978). *Celebration of discipline*. London, UK: Hodder and Stoughton.
- Foster, R. (1992). *Prayer: finding the heart's true home*. London, UK: Hodder and Stoughton.
- Francis, L. J., Robbins, M., Kaldor, P., & Castle, K. (2009). Psychological type and work-related psychological health among clergy in Australia, England and New Zealand. *Journal of Psychology and Christianity*, 28(3), 200-212.
- Frank, T. E. (2002). The discourse of leadership and the practice of administration. *Journal of Religious Leadership*, 1(2).
- Frost, M. (2011). *The road to missional*. Grand Rapids, MI: Baker Books.
- Galindo, I. (2004). *The hidden lives of congregations: discerning church dynamics*. Herndon, VA: Alban Institute.
- Gallaher, B. (2007). *Stress and burnout in paid pastoral ministry within the Presbyterian Church of Aotearoa New Zealand*. (MTS), Bible College of New Zealand, Auckland.
- Gardner, H., Hobbs, J. H., & Hobbs, E. A. (2010). *The Goodwork project: toolkit guidebook*. Retrieved from <http://www.thegoodproject.org/pdf/GoodWork-Toolkit-guide.pdf>
- Galt, M. (2014). *A survey of parish life: 2014 statistical update*. PCANZ. Retrieved from http://www.presbyterian.org.nz/sites/public_files/for_parishes/statistics/2014_Statistical_Update.pdf
- General Assembly of PCANZ. (2006). *Conditions of service manual: supplementary provision to the Book of Order 2006_2*. Retrieved from <http://www.presbyterian.org.nz> in 2007.
- General Assembly of PCANZ. (2014). *Conditions of service manual: supplementary provision to the Book of Order Vol. 2014*. Retrieved from http://www.presbyterian.org.nz/sites/default/files/a._Conditions_of_Service_Manual_30_June_2014.pdf
- Gibbs, E., & Coffey, I. (2001). *Church next: quantum changes in Christian ministry*. Leicester, UK: Inter Varsity Press.
- Gibbs, G. (2007). *Analyzing qualitative data*. Los Angeles, CA: Sage Publications.
- Gibbs, G. (2010). *Grounded Theory open coding parts 1, 2, and 3* [Video]: University of Huddersfield, UK..
- Giddings, L., & Grant, B. (2007). A Trojan horse for positivism? A critique of mixed methods research. *Advances in Nursing Science*, 1(23), 52 - 60.
- Giske, T., & Artinian, B. (2007). A personal experience of working with classical Grounded Theory: from beginner to experienced grounded theorist. *International Journal of Qualitative Methods*, 6(4), 67 - 80.
- Glaser, B. (2008). Qualitative and quantitative research. *Grounded Theory Review: an International Journal*, 7(2).
- Glaser, B. (2013a). Introduction: free style memoing. *Grounded Theory Review*, (2). Retrieved from <http://groundedtheoryreview.com/2013/12/22/introduction-free-style-memoing/>

- Glaser, B. (2013b). Staying open: the use of theoretical codes in GT. *Grounded Theory Review*, (1). Retrieved from <http://groundedtheoryreview.com/2013/06/22/staying-open-the-use-of-theoretical-codes-in-gt/>
- Gläser, J., & Laudel, G. (2013). Life with and without coding: two methods for early-stage data analysis in qualitative research aiming at causal explanations. *Qualitative Social Research*, 14(2), 31-37.
- Globoforce. (2013). *Globoforce UK survey reveals traditional annual reviews provide inaccurate indication of employee performance*. Retrieved from <http://www.globoforce.com/news/press-releases/globoforce-uk-survey-reveals-traditional-annual-reviews-provide-inaccurate-indication-of-employee-performance/>
- Goleman, D. (1995). *Emotional intelligence*. London, UK: Bloomsbury.
- Gomm, R., Hammersley, M., & Foster, P. (2000). *Case study method: key issues, key texts*. E-book retrieved from <http://books.google.co.nz/books?id=c1VOCAGy86EC>.
- Grainger, J. E. (2008). *Mind shift: creating change through narrative learning cycles*. (Dissertation/Thesis), AUT.
- Grant, B. M., & Giddings, L. S. (2002). Making sense of methodologies: a paradigm framework for the novice researcher. *Contemporary Nurse*, 13, 10 - 28.
- Grant, M. A. (2010). *A theory of women engaged in liberation theological praxis*. (3404757 Ph.D.), Fielding Graduate University, Ann Arbor. Retrieved from ProQuest Dissertations & Theses Global database.
- Gratton, R. (2004). Teacher appraisal: a lesson on confusion over purpose. *International Journal of Educational Management*, 18(5), 292-296.
- Gray, J., & Tucker, J. (1986). *Presbyterian polity for church officers*. Louisville, KY: Geneva.
- Gray, R. (2004). *How people work*. Harlow, UK: Prentice Hall.
- Greene, A. M., & Robbins, M. (2015). The cost of a calling? clergywomen and work in the Church of England. *Gender, Work & Organization*, 22(4), 405-420.
- Greenleaf, R. K. (1991). *Servant leadership: a journey into the nature of legitimate power and greatness*. (2nd. ed.). New York, NY: Paulist Press.
- Gregory, J. (Writer). (2015). Reviewing the state of reviewing [radio], *Interview with Rosabel Tan*: Radio New Zealand National.
- Guerrier, Y., & Bond, C. (2013). Reluctant managers: Methodist ministers and management. *Journal of Management Development*, 33(7), 680 - 693.
- Gugel, J. R. (2004). Being for others: a model for mutual ministry committees. *The Clergy Journal*, 81(1), 33-34.
- Guy, I. (2008). *Draft report on Ministry Development Programme*. Dunedin, NZ: Presbyterian Church of Aotearoa New Zealand.
- Guy, L. (2012). *Who are the Baptists? Looking through a New Zealand lens*. Auckland, NZ: Carey Baptist College.
- Harris, K. J. (2015). *Missional church: comparisons and reflections on the 3DM and Missional Network models*. Retrieved from <http://knoxcentre.ac.nz/wp-content/uploads/2012/11/Missional-ChurchComparisons-and-Reflections-on-the-3DM-and-Missional-Network-models.pdf>
- Hammersley, M. (1981). Using qualitative methods. *Social Science Information Studies*, 1(4), 209-220.
- Hammersley, M. (2013). *What is qualitative research?* Retrieved from http://www.aut.eblib.com.au/EBLWeb/patron/?target=patron&extendedid=P_1080413_0
- Hammersley, M., & Traianou, A. (2012). *Ethics in qualitative research: controversies and contexts*. London, UK: Sage Publications.
- Hannabuss, S. (1996). Research interviews. *New Library World*, 97(5), 22-30.
- Harrower, J. (2010). *A vision for new Anglicanism: context and contours*. Paper presented at the Institute for New Anglicanism, Nelson, NZ. Retrieved from

- <http://www.bishopdale.ac.nz/documents/JohnHarrowerNZANewOpennesstoChange-TheTasExp2010.pdf>
- Haski-Leventhal, D., Stallings, B., & Ellis, S. (2012). Leading the way to successful volunteer involvement: practical tools for busy executives. *Voluntas*, 23, 530-531.
- Hawkins, P., & Shohet, R. (2009). *Supervision in the helping professions: an individual, group and organizational approach* (Third ed.). Philadelphia, PA: Open University.
- Henwood, K., & Pidgeon, N. (2003). *Grounded theory in psychological research*. Washington, DC: American Psychological Association.
- Herrington, J., Bonem, M., & Furr, J. (2000). *Leading congregational change: a practical guide for the transformational journey*. San Francisco, CA: Jossey-Bass.
- Herron, A. (1993) "Presbytery". In N. M. Cameron (Ed.), *Dictionary of Scottish church history and theology*. Edinburgh, UK: T&T Clark.
- Herron, A. (1999). *Kirk lore*. Edinburgh, UK: Saint Andrew Press.
- Hofstee, C. (2015). *Mindfulness stress reduction training*, Auckland, New Zealand: Renewyourmind.
- Hogg, M. A., Adelman, J. R., & Blagg, R. D. (2010). Religion in the face of uncertainty: an uncertainty-identity theory account of religiousness. *Personality and Social Psychology Review*, 14(1), 72-83.
- Holmes, D. (2006). A New (Zealand) Way of Working. *Ministry Today*, 36.
- Hopko, T. (2010). *Bishops - part 2: the New Testament and early church model*. Retrieved from http://www.ancientfaith.com/podcasts/hopko/bishops_part_2_the_new_testament_and_early_church_model
- Hudson, J. (1992). *Evaluating ministry: principles and processes for clergy and congregations*. Herndon, VA: Alban Institute.
- Hudson, J. (2004). *When better isn't enough: evaluation tools for the 21st-century church*. Lanham, MD: Rowman and Littlefield.
- Hunt, M. R. (2009). Strengths and challenges in the use of interpretive description: reflections arising from a study of the moral experience of health professionals in humanitarian work. *Qualitative Health Research*, 19(9), 1284-1292.
- Hybels, B. (2011). *Axiom: powerful leadership proverbs*. Grand Rapids, MI: Zondervan.
- Jabbour, C. J. C., & Santos, F. C. A. (2009). Problems associated with voluntary work in a small not-for-profit organization: a case from Brazil. *Management Research News*, 32(10), 921-931.
- Jamieson, A. (2004). *Called again: in and beyond the deserts of faith*. Wellington, NZ: Philip Garside Publishing Ltd.
- Johnston, M. (2012). *Uneasy rider? the challenge to a ministry of Word and Sacrament in a post-Christendom missional climate*. Dunedin: Knox Centre for Ministry and Leadership.
- Jones, D. (1997). The whaanau/support interview. *Employee Relations*, 19(4/5), 321-336.
- Jones, D. L. (2015). Key family systems terms. Provided by author to Auckland Presbytery.
- Jones, S. (2008). Making sense of ministry reviews. *Candour*(April 2008), 6 - 8.
- Jones, S. (2010). Admitting the disease is terminal. *Candour*(July 2010), 14-15.
- Kaiser, J. (2006). *Winning on purpose; how to organise congregations to succeed in their mission*. Nashville, TN: Abingdon Press.
- Kamaria, K., & Lewis, A. (2009). The not-for-profit general management responsive capability competencies: a strategic management perspective. *Business Strategy Series*, 10(5), 296 - 310.
- Kaplan, R. (2010). Conceptual foundations of the balanced scorecard. *SSRN Working Paper Series*. Retrieved from <http://ezproxy.aut.ac.nz/login?url=http://search.proquest.com/docview/189846881?accountid=8440>

- Kaufman, K. (2012). Do trust and transparency make or break us? *HR Professionals Magazine*, 2. Retrieved from http://issuu.com/hrprofessionalsmagazine/docs/hrp_june_2012
- Kimberly, T. (2012). The dreaded performance review. *Phi Kappa Phi Forum*, 92(1), 23.
- Kirkpatrick, C., & Hopper, W. H. (1997). *What unites Presbyterians: common ground for troubled times*. Louisville, KY: Geneva Press.
- Kitchen, M. C. (2013). Methods in focus group interviews in cross-cultural settings. *Qualitative Research Journal*, 13(3), 265-277.
- Knox Centre for Ministry and Leadership. (2015). *National ordained ministry*. Retrieved from <http://knoxcentre.ac.nz/ordained-ministry/national-ordained-ministry>
- Kouzes, J. M., & Posner, B. Z. (1999). *Encouraging the heart*. San Francisco, CA: Jossey-Bass.
- Kvale, S. (2007). *Doing interviews*. London, UK: Sage Publications.
- Lachman, D. C. (1993). "Elder, Eldership". In N. M. Cameron (Ed.), *Dictionary of Scottish Church History and Theology* (pp. 286 - 288). Edinburgh: T&T Clark.
- Latham, G. P., Almost, J., Mann, S., & Moore, C. (2005). New developments in performance management. *Organizational Dynamics*, 34(1), 77-87.
- Lawson, K. E., & Eguizabal, O. (2009). Leading ministry teams, part II: research on effective teams with implications for ministry team leadership. *Christian Education Journal*, 6(2), 265-281.
- Lencioni, P. (2002). *The five dysfunctions of a team: a leadership fable*. San Francisco, CA: Jossey-Bass.
- Lepak, D., & Snell, S. (2002). Examining the human resource architecture: the relationships among human capital, employment, and human resource configurations. *Journal of Management*, 28(4), 517-543.
- Lepsinger, R., & Lucia, A. D. (1997). *The art and science of 360 degree feedback*. San Francisco, CA: Jossey-Bass.
- Levy, P. E., & Williams, J. R. (2004). The social context of performance appraisal: a review and framework for the future. *Journal of Management*, 30(6), 881-905.
- Lichtenwalner, B. (2012). *Do you really know your stakeholders?* Retrieved from <http://modernservantleader.com/servant-leadership/do-you-really-know-your-stakeholders/>
- Lidow, D. (2015). Creating a personal leadership strategy. *Leader to Leader*, 2015(75), 37-42.
- Luecke, R. (2006). *Performance management: measure and improve the effectiveness of your employees*. Boston, MA: Harvard Business Essentials.
- Mabon v Conference of the Methodist Church of New Zealand* (1998). No. 3 NZLR 513. New Zealand Court of Appeal
- Mack, N., Woodsong, C., Macqueen, K. M., Guest, G., & Namey, E. (2005). *Qualitative research methods: a data collector's field guide*. Retrieved from http://www.parkdatabase.org/files/documents/2005_usaid_qualitative_research_methods.pdf
- Macky, K. (Ed.). (2008). *Managing human resources: contemporary perspectives in New Zealand*. North Ryde, Australia: McGraw Hill.
- Malterud, K. (2001). Qualitative research: standards, challenges and guidelines. *The Lancet*, 358(August 11, 2001), 483 - 488.
- Mandy, A., & Tinley, P. (2004). Burnout and occupational stress: comparison between United Kingdom and Australian podiatrists. *Journal of the American Podiatric Medical Association*, 94(3), 282.
- Marlow, S. (2000). Investigating the use of emergent strategic human resource management activity in the small firm. *Journal of Small Business and Enterprise Development*, 7(2), 135 - 148.
- Martin, E. A., Hess, J., & Siegel, P. M. (1995). *Some effects of gender on the meaning of work*. Retrieved from <https://www.census.gov/srd/papers/pdf/sm9509.pdf>
- Maxwell, J. A., & Mittapalli, K. (2007). *The value of Critical Realism for qualitative research*. Paper presented at the Annual Conference of the International Association for Critical Realism, Philadelphia, PA.

- McDonald, D., & Smith, A. (1995). A proven connection: performance management and business results. *Compensation & Benefits Review*, 27(1), 59-64.
- McGregor, D. (1957). An uneasy look at performance appraisal in *Manage people, not personnel: motivation and performance appraisal*. (pp. 155- 166). Boston, MA: Harvard Business Press.
- McGregor, D., & Smith, M. M. (1975). An uneasy look at performance appraisal. *JONA: The Journal of Nursing Administration*, 5(7), 27-31.
- McKenna, R. B., Boyd, T. N., & Yost, P. R. (2007). Learning agility in clergy: understanding the personal strategies and situational factors that enable pastors to learn from experience. *Journal of Psychology and Theology*, 35(3), 190 – 201.
- McKenna, S. (2002). Can knowledge of the characteristics of “high performers” be generalised? *Journal of Management Development*, 21(9), 680-701.
- McKenna, S., Richardson, J., & Manroop, L. (2011). Alternative paradigms and the study and practice of performance management and evaluation. *Human Resource Management Review*, 21(2), 148-157.
- McKenna, S., Singh, P., & Richardson, J. (2008). The drunkard’s search: looking for ‘HRM’ in all the wrong places. *Management International Review*, 48(1), 115-136.
- McLaren, B. (2008). *Finding our way again*. Nashville, TN: Thomas Nelson.
- McLean, H. (2000). Evaluating the evaluation. *The Clergy Journal*, 76(4), 37.
- McLeay, V. F. (1972). *Motivational factors in Catholic and Presbyterian theological students*. (B Sc), University of Otago, Dunedin.
- McMaster, K. (Producer). (2012). Motivational interviewing - an M.I. learning resource. [Video] Retrieved from <https://www.youtube.com/watch?v=cPd1aLOfwF4&feature=relmfu>
- McNeal, R. (2009). *Missional renaissance: changing the scorecard for the church*. San Francisco, CA: Jossey Bass
- McShane, S., & Travaglione, T. (2007). *Organisational behaviour on the Pacific rim* (2 ed.). North Ryde, Australia: McGraw Hill Irwin.
- Messina, S. (2007). Human Resources Management for church ministry. *Compass*, 41(3), 25 - 41.
- Miller, G. (2002). *Growing great Kiwi churches*. Tauranga, NZ: AFFIRM publications.
- Ministry Training Strategy Ltd. (2014). *Adjusting to ministry work*. Retrieved from http://www.mts.com.au/assets/pdf/Resources/Discussionpapers/D_801_Adjusting_to_Ministry_work_0414.pdf
- Moon, J. (2004). Using reflective learning to improve the impact of short courses and workshops. *Journal of Continuing Education in the Health Professions*, 24(1), 4-11.
- Moon, P. K. (2013). *Resilience and wellbeing in a sample of Singaporean clergy*. (3604981 Psy.D.), Fuller Theological Seminary, School of Psychology, Ann Arbor. Retrieved from ProQuest Dissertations & Theses Global database
- Nadin, S., & Cassell, C. (2007). New deal for old? exploring the psychological contract in a small firm environment. *International Small Business Journal*, 25(4), 417-443.
- Nayar, V. (2005). A qualitative study of general practitioners’ views of the appraisal process. *Education for Primary Care*, 16, 672-679.
- Needham, A. (2003). *Workplace bullying: the costly business secret*. Auckland, NZ: Penguin.
- New Zealand Association of Counsellors. (2012). *Code of ethics: a framework for ethical practice*. Retrieved from http://www.nzac.org.nz/viewobj.cfm/nzac_code_of_ethics_july_2012.pdf?file_name=nzac_code_of_ethics_july_2012.pdf&objID=27&f=true
- Nichol, J. L. (2011). *Exploring working lives through the framework of the psychological contract: A study of clergy in the Church of England in the 21st century*. (Ph D), University of Gloucestershire, Gloucestershire, UK.
- Niebuhr, H. R., Williams, D. D., & Gustafson, J. M. (1956). The emerging new conception of the ministry in *The purpose of the Church and its ministry*. Retrieved from <http://www.religion-online.org/showchapter.asp?title=407&C=152>.

- Nieuwhof, C. (2015). What self-aware leaders know ... that others don't. *Church Leaders*. <http://www.churchleaders.com/pastors/pastor-articles/176839-carey-nieuwhof-self-aware-leaders-know-that-others-don-t.html>
- Northcott, N. (2000). Clinical supervision: professional development or management control? In J. Spouse & L. Redfern (Eds.), *Successful supervision in health care practice: promoting professional development*. Malden, MA: Blackwell Science.
- Northern Baptist Association of Churches. (2013). *Ministry review pack*. Auckland, NZ.
- Northern Presbytery. (2015). *Study leave application*. Retrieved from <http://www.northpres.org.nz/study-leave-application/>
- Norton, A. (2015). *Monuments, management and movements*. Retrieved from <http://candour.presbyterian.org.nz/2015/07/02/monuments-management-and-movements/#more-93>
- Nye, M. J. (2002). Michael Polanyi (1891-1976) (biography). *Hyle: International Journal for Philosophy of Chemistry*, 8(2), 123-127.
- Nygren, D. J., Ukeritis, M. D., McClelland, D. C., & Hickman, J. L. (1994). Outstanding leadership in nonprofit organizations: leadership competencies in Roman Catholic religious orders. *Nonprofit Management and Leadership*, 4(4), 375-391.
- O'Doherty, D., & Willmott, H. (2001). Debating labour process theory: the issue of subjectivity and the relevance of poststructuralism. *Sociology*, 35(2), 457-476.
- Olsen, W. (2009). Realist methodology: a review. *Realist Methodology*. Retrieved from <http://www.hetecon.net/documents/Post-GraduateWorkshop/AHE-MW-2012-15.pdf>
- Owens, L. R. (2014). *The better way to 360 degree feedback*. Retrieved from <http://www.faithandleadership.com/l-roger-owens-better-way-360-degree-feedback>
- Patterson, K., Grenny, J., McMillan, R., & Switzler, A. (2012). *Crucial conversations: tools for talking when stakes are high* (2nd ed.). New York, NY: McGraw-Hill.
- PCANZ Leadership Sub-committee (2015). [Answers to Ministers' Review Questions].
- Peyton, N., & Gatrell, C. (2013). *Managing clergy lives: obedience, sacrifice, intimacy*. London, UK: Bloomsbury Academic.
- Pfeffer, J. (1998). Seven practices of successful organizations. *California Management Review*, 40(2), 96 - 124.
- Phillips, T. (2009). *Why are ministers leaving the ministry?* Study Leave report. Presbyterian Church of Aotearoa New Zealand. Auckland.
- Pickering, S. (2008). *Spiritual Direction*. London, UK: Canterbury Press.
- Pink, D. (2009). *Drive: The Surprising Truth about What Motivates Us*. Edinburgh, UK: Canongate.
- Piper, J. (2003). *Brothers, we are not professionals*. Fearn, UK: Mentor.
- Plowright, D. (2011). *Using mixed methods: frameworks for an integrated methodology*. London, UK: Sage.
- Plunkett, S. W. (2002). *This We Believe: Eight Truths Presbyterians Affirm*. Louisville, KY: Geneva Press.
- Ponsonby Baptist Church. (2015). *Ponsonby Baptist Church*. Retrieved from <http://www.ponsonbybaptist.org.nz/index.html>
- Popham, W. J. (2013). On serving two masters: formative and summative teacher evaluation. *Principal Leadership*. Retrieved from http://www.nassp.org/tabid/3788/default.aspx?topic=On_Serving_Two_Masters
- Potter, P. (2014). *A new kind of church*. Paper presented at the 2014 Baptist Assembly Waitangi, NZ.
- Pratt, T. J. (2011). *Leading the church through crisis including the minister's sudden departure*. (MBA) AUT. Retrieved from <http://hdl.handle.net/10292/3450>
- Presbyterian Church of Aotearoa New Zealand. (1982). Appendix E4: Presbytery visitation of a parish. Retrieved from <http://www.presbyterian.org.nz/for-parishes/book-of-order/old-appendices/appendix-e-4-presbytery-visitation-of-a-parish>
- Presbyterian Church of Aotearoa New Zealand. (2004). *Minutes of General Assembly 2004*. Christchurch, NZ. Retrieved from

- http://www.presbyterian.org.nz/sites/default/files/about_us/general_assembly/2004Minutes.pdf
- Presbyterian Church of Aotearoa New Zealand. (2006). *Minutes of General Assembly 2006*. Auckland, NZ. Retrieved from http://www.presbyterian.org.nz/sites/default/files/about_us/general_assembly/GA06MinutesFinal.pdf
- Presbyterian Church of Aotearoa New Zealand. (2008a). *Minutes of General Assembly 2008*. Upper Hutt, NZ. Retrieved from http://www.presbyterian.org.nz/sites/default/files/about_us/general_assembly/GA08_Minutes.pdf
- Presbyterian Church of Aotearoa New Zealand. (2008b). *Summary of Bible Society survey*. Retrieved from http://www.presbyterian.org.nz/sites/default/files/national_mission/BIBLE_SOCIAL_SURVEY_MARCH_2008.pdf
- Presbyterian Church of Aotearoa New Zealand. (2008c). *What does it mean to be Presbyterian?* Retrieved from http://www.presbyterian.org.nz/sites/default/files/for_parishes/standing_out_What_it_means_to_be_presbyterian.pdf
- Presbyterian Church of Aotearoa New Zealand. (2014a). *The Book of Order* Retrieved from <http://www.presbyterian.org.nz/for-parishes/book-of-order>
- Presbyterian Church of Aotearoa New Zealand. (2014b). *Presbyterian Church embraces its ethnic diversity*. Retrieved from [www.presbyterian.org.nz website: http://www.presbyterian.org.nz/speaking-out/what-weve-said/media-releases/presbyterian-church-embraces-its-ethnic-diversity](http://www.presbyterian.org.nz/speaking-out/what-weve-said/media-releases/presbyterian-church-embraces-its-ethnic-diversity)
- Presbyterian Church of Aotearoa New Zealand General Assembly Office. (2014). *Ministry Development Programme*. Retrieved from http://www.presbyterian.org.nz/sites/default/files/a.Ministry_Development_Programme_Jan_2014_.pdf
- Presbyterian Church of Aotearoa New Zealand. (2015). *Ministry Development Programme*. Retrieved from <http://www.presbyterian.org.nz/for-ministers/ministry-development-programme>
- Pulakos, E., Mueller-Hanson, R., O'Leary, R., & Meyrowitz, M. (2012). Building a high-performance culture: a fresh look at performance management. *Effective Practice Guidelines*, 39.
- Qu, S. Q., & Dumay, J. (2011). The qualitative research interview. *Qualitative Research in Accounting & Management*, 8(3), 238-264.
- Reed, E. (2006). *Is ministry leadership different? Andy Stanley and Jim Collins in an unexpected point-counterpoint*. Retrieved from <http://www.christianitytoday.com/le/2006/march-online-only/is-ministry-leadership-different-andy-stanley-and-jim.html>
- Regional Synod of Albany. (2014). *Evaluation of the Minister*. Retrieved from <http://albanysynod.org/wp-content/uploads/2014/04/ministerreview.rtf>
- Rendle, G. (2002). Reclaiming professional jurisdiction: the re-emergence of the theological task of ministry. *Theology Today*, 59(3), 408-420.
- Rendle, G., & Mann, A. (2003). *Holy conversations: strategic planning as a spiritual practice for congregations*. [Kindle version]. Retrieved from Amazon.com.
- Ringo, T., Schwyer, A., deMarco, M., Jones, R., & Lesser, E. (2008). *Integrated talent management Part 1 - understanding the opportunities for success*. Retrieved from <http://www-935.ibm.com/services/us/gbs/bus/pdf/gbe03071-usen-talentpart1.pdf>
- Roberts, G., & Pregitzer, M. (2007). Why employees dislike performance appraisals. *Regent Global Business Review*, 1(1).
- Roberts, G. E. (2003). Employee performance appraisal system participation: A technique that works. *Public Personnel Management*, 32(1), 89.
- Robson, S. (2013). *Missional or misguided? Exploring the ecclesiology of New Zealand Baptist churches without church buildings*. (Master of Ministry), University of Otago.

- Roehling, M. V., Boswell, W. R., Caligiuri, P., Feldman, D., Graham, M. E., Guthrie, J. P., Morishima, M., & Tansky, J. W. (2005). The future of HR management: research needs and directions. *Human Resource Management*, 44(2), 207-216.
- Roxborough, J. (2002, 6 December 2002). *Persistent Presbyterianism? Lay leadership and the future of Christianity in the West*. Paper presented at the Future of Christianity in the West Conference,, Otago University.
- Roxborough, J. (2005a). LOMs, NOMs and CEOs. *Candour*(March, 2005), 8 - 10.
- Roxborough, J. (2005b). Parishes at the triage station. *Candour*(August, 2005), 11-12.
- Roxburgh, A. (2011). *Joining God in the neighborhood*. Grand Rapids, MI: Baker Books.
- Rudman, R. (2010). *Human Resources Management in New Zealand* (5th ed.). Auckland, NZ: Pearson.
- Sackett, D. L., & Wennberg, J. E. (1997). Choosing the best research design for each question. *BMJ*, 315(7123), 1636.
- Samiento, S. (2008). *Bishops question competence of clergy*. Retrieved from <http://www.thinkinganglicans.org.uk/archives/003108.html>
- Samuels, N. (2003). *An appreciative performance appraisal conversation*. Retrieved from <https://appreciativeinquiry.case.edu/ai/uploads/An%20Appreciative%20Performance%20Appraisal%20Conversation.doc>
- Sanders, J., O'Brien, M., Tennant, M., Sokolowski, S. W., & Salamon, L. M. (2008). *The New Zealand non-profit sector in comparative perspective*. Retrieved from <http://aut.lconz.ac.nz/vwebv/holdingsInfo?bibld=1527862>
- Sashkin, M. (1981). Appraising appraisal: Ten lessons from research for practice. *Organizational Dynamics*, 9(3), 37-50.
- Schaefer, A. G., & Jacobsen, S. (2009). Surviving clergy burnout. *Encounter*, 70(1), 37-66.
- Schmidt, S. E. (2013). *Work experiences of New Zealand clergy and their wives*. (M. Sc.), Massey University. Retrieved from http://mro.massey.ac.nz/bitstream/handle/10179/5283/02_whole.pdf?sequence=2
- Schnase, R. (1991). *Testing and reclaiming your call to ministry*. Nashville, TN: Abingdon Press.
- Schwartz, J., Bersin, J., & Pelster, B. (2014). *Global human capital trends 2014*. Retrieved from <http://dupress.com/articles/human-capital-trends-2014-survey-top-10-findings/>
- Shelley, M. (1985). *Well-intentioned dragons: ministering to problem people in the church*. E-book from Logos Bible Software.
- Sherman, D. (2015). *Your pastor needs you*. Retrieved from <http://www.my-pastor.com/>
- Simpson, J. (2010). *Lazy leadership*. Retrieved from <http://www.jmm.org.au/articles/24406.htm>
- Smith, M., & Wright, D. (2011). *The church leader's MBA*. [Kindle version]. Retrieved from Amazon.com.
- Smith, M. K. (2001). The Learning Organisation. *The Encyclopedia of Informal Education*. Retrieved from <http://www.infed.org/biblio/learning-organization.htm>
- Speckbacher, G. (2003). The economics of performance management in nonprofit organizations. *Nonprofit management and leadership*, 13(3), 267-281.
- Stanley, A. (2012). *Deep and wide*. [Kindle version]. Retrieved from Amazon.com.
- Steger, M. F., Pickering, N. K., Shin, J. Y., & Dik, B. J. (2010). Calling in work: secular or sacred? *Journal of Career Assessment*, 18(1), 82-96.
- Steinke, P. L. (2006). *Healthy congregations: a systems approach*. Herndon, VA: Alban Institute.
- Steinkellner, P., Elfriede, C., & Guenter, L. (2011). Development-focused performance management from a resource-based perspective. *Advances in Business-Related Scientific Research Journal*, 2(1), 11 - 23.
- Stone, P. (2002). Deciding upon and refining a research question. *Palliative Medicine*, 16(3), 265-267.

- Strauss, A., & Corbin, J. (Eds.). (1997). *Grounded Theory in practice*. Thousand Oaks, CA: Sage.
- Strom, M. (2014). *Lead with wisdom: how wisdom transforms good leaders into great leaders*. Melbourne, Australia: Wiley.
- Sturt, J. A. (1998). *Created to be whole*. Guildford, UK: Eagle.
- Surber, C. (2014). *Pastor: what you can do about the meeting after the meeting*. Retrieved from <http://www.churchleaders.com/pastors/pastor-how-to/171747-pastor-what-can-you-do-about-the-meeting-after-the-meeting.html>
- Sustaining Pastoral Excellence Initiative. (2010). *Evaluation essentials for congregational leaders: setting the table for healthy conversations*. Retrieved from http://www.crcna.org/sites/default/files/Evaluation_Essentials.pdf
- Sutherland, M. (2007). The New Zealand Baptist as an agent of denominational identity 1874-1960. *Pacific Journal of Baptist Research*, 3(1), 23-29.
- Sutherland, M. (2011). *Conflict and connection: Baptist identity in New Zealand*. Auckland, NZ: Archer Press.
- Sutton, R. I., & Staw, B. M. (1995). What theory is not. *Administrative Science Quarterly*, 40(3), 371-384.
- Sweeney, B. (2015). *Finance Newsletter 173*. Retrieved from http://presbyterian.org.nz/sites/public_files/for_parishes/newsletters/2015/Newsletter_173_May_2015.pdf
- Tams, S. (2008). Constructing self-efficacy at work: a person-centered perspective. *Personnel Review*, 37(2), 165-183.
- Taylor, S. N., & Bright, D. S. (2011). Open-mindedness and defensiveness in multisource feedback processes: a conceptual framework. *The Journal of Applied Behavioral Science*, 47(4), 432-460.
- Thatcher, A. (Ed.). (1999). *Spirituality and the curriculum*. London, UK: Cassell.
- Thomas, P. (2014a). *Discussion of appraisal guidelines*. Retrieved from <https://www.collegeofbaptistministers.org/development/appraisals/>
- Thomas, P. (2014b). *Your CMD portfolio*. Retrieved from <https://www.collegeofbaptistministers.org/development/yourportfolio/>
- Thorne, S. (2008). *Interpretive description* (Vol. 2). Walnut Creek, CA: Left Coast Press.
- Thorne, S., Kirkham, S. R., & MacDonald-Emes, J. (1997). Interpretive description: a noncategorical qualitative alternative for developing nursing knowledge. *Research in Nursing & Health*, 20(2), 169-177.
- Thorne, S. (2008). *Interpretive description* (Vol. 2). Walnut Creek, CA: Left Coast Press.
- Tjan, A. K. (2012). How leaders become self-aware. *Harvard Business Review*. <https://hbr.org/2012/07/how-leaders-become-self-aware/>
- Tompkins, P., & Lawley, T. (1997). *Less is more ... the art of clean language*. Retrieved from <http://www.cleanlanguage.co.uk/articles/articles/109/1/Less-Is-More-The-Art-of-Clean-Language/Page1.html>
- Torrance, T. F. (1998). The place of Michael Polanyi in the modern philosophy of science *Transformation and convergence in the frame of knowledge: explorations in the interrelations of scientific and theological enterprise* (pp. 107 - 173). Eugene, OR: Wipf and Stock.
- Macdonald v Free Presbyterian Church of Scotland* (2010). UK Employment Tribunal. Retrieved from <http://www.lawandreligionuk.com/2013/12/07/clergy-employment-and-sharpe-v-worcester-dbf/>
- Ulrich, D. (1998). Intellectual capital = competence x commitment. *Sloan Management Review*, 39(2), 15.
- Ulrich, D., Zenger, J., & Smallwood, N. (2013). *Results-Based Leadership*. E-book on google.books.com.
- Urquhart, C. (2013). *Grounded theory for qualitative research: a practical guide*. Los Angeles, CA: Sage.
- Urquhart, C., & Fernández, W. (2013). Using grounded theory method in information systems: the researcher as blank slate and other myths. *Journal of Information Technology*, 28(3), 224.

- Vallerand, R. J., Pelletier, L. G., & Koestner, R. (2008). Reflections on self-determination theory. *Canadian Psychology*, 49(3), 257–262.
- Vijay, M. (2006). The imposter syndrome. *OR-MS Today*, 33(6), 10.
- Vischer, L. (Ed.). (1991). *Eldership in the Reformed Churches today*. Geneva: WARC.
- Vischer, L. (Ed.). (1992). *The Ministry of the Elders in the Reformed Churches*. Berne, Switzerland: Swiss Federation of Protestant Churches.
- Walker, D., & Myrick, F. (2006). Grounded Theory: an exploration of process and procedure. *Qualitative Health Research*, 16(4), 547-559.
- Ward, K. (1996). Spiritual survival in ministry. *Reality*. Retrieved from <http://knoxcentre.ac.nz/wp-content/uploads/2012/04/Ward-Spiritual-Survival-in-Ministry-1996.pdf>
- Ward, K. (2002). Rugby and church: worlds in conflict. *Reality*, 53(October/November), 26 - 30.
- Ward, K. (2013). *Losing our religion: changing patterns of believing and belonging in secular Western societies*. Eugene, OR: Wipf & Stock.
- Webber, A. (1993). What's so new about the new economy? *Harvard Business Review*. Retrieved from <https://hbr.org/1993/01/whats-so-new-about-the-new-economy>
- Wells, B. (2011). *Three questions for a 360*. Retrieved from <http://www.faithandleadership.com/three-questions-360>
- Wertz, F. J. (2011). *Five ways of doing qualitative analysis: phenomenological psychology, grounded theory, discourse analysis, narrative research, and intuitive inquiry*. New York, NY: Guilford Press.
- White, M. M. (2009). *Measuring Ministry*. Retrieved from <https://www.faithandleadership.com/measuring-ministry>
- White, P. (2009). *Developing research questions: a guide for social scientists*. New York, NY: Palgrave Macmillan.
- Williams, R. (2003). *Silence and honeycakes: the wisdom of the desert*. Oxford, UK: Lion Books.
- Wimberly, J. W. (2011). *The business of the church: the uncomfortable truth that faithful ministry requires effective management*. [Kindle version]. Retrieved from Amazon.com.
- Wimberly, J. W. (2015). *Organizational and staff performance reviews*. Retrieved from <http://managingministry.com/2015/09/04/organizational-andor-staff-performance-reviews/>
- Winslade, B. (1994). *Elders and their place in our church*. Auckland, NZ: New Zealand Baptist Union.
- Winslade, B. (2009). *Understanding congregational government*. Retrieved from http://www.baptist.org.au/site/DefaultSite/filesystem/documents/Articles_Oct2010/Understanding_Congregational_Government.pdf
- Woodside, A. G., & Wilson, E. J. (2003). Case study research methods for theory building. *The Journal of Business & Industrial Marketing*, 18(6/7), 493.
- Wourms, E. A. (2007). *Equipping congregational leaders to live their biblical call from Ephesians 4:11--16 by facilitating growth in self-awareness*. (Dissertation/Thesis), ProQuest Dissertations Publishing.
- Wright, C., Hannah, A., & Ward, K. (2013). *Ministry Development Review training: training manual*. Dunedin, NZ: Knox Centre for Ministry and Leadership.
- Wright, W. C. (2000). *Relational leadership*. Carlisle: Paternoster.
- Wrzesniewski, A., McCauley, C., Rozin, P., & Schwartz, B. (1997). Jobs, careers, and callings: people's relations to their work. *Journal of Research in Personality*, 31(1), 21-33.
- Yap, P., & Ferreira, A. (2010). *The complex and multifaceted world of performance management in NGOs: a case study*. Draft report. Monash University. Retrieved from <http://www.fep.up.pt/conferencias/10seminariogrudis/Ferreira,%20Ald%C3%B3nio%20-%20The%20Complex%20and%20Multifaceted%20World%20of%20Performance%20Management%20in%20NGO%20-%20a%20CS.pdf>

- Yeung, H. W. (1997). Critical Realism and realist research in human geography: a method or a philosophy in search of a method? *Pastoral Psychology*, 21(1), 51 - 74.
- Zech, C. E. (Ed.). (2010). *Best practices in Catholic church ministry performance management*. Lanham, MD: Rowman and Littlefield.
- Zenger, J. (2014). The singular secret for a leader's success: self-awareness. *Forbes.com*. <http://www.forbes.com/sites/jackzenger/2014/04/17/the-singular-secret-for-a-leaders-success-self-awareness/>

Appendices

1. Digital Invitation
2. Participant Information
3. Consent Form
4. Interview Guide
5. Bible references relevant to ministry evaluation
6. Participant pseudonyms and other demographic data
7. Presbyterian Minister Job Description dated 2004
8. Samples of interview style

Appendix 1 - Digital Invitation to potential participants

Project title: Baptist and Presbyterian Ministers' Experience of Performance Review in NZ
Project Supervisor: Dr Candice Harris, AUT
Researcher: Vivian Coleman

To ministers of the PCANZ/Baptist family of churches

Where two options are given, the first wording is for Presbyterian participants, the second for Baptist pastors.

An Invitation

My name is Vivian Coleman and I am a post-graduate student studying Human Resources for a thesis in Masters of Business at AUT. I am also a minister in full standing of the Presbyterian Church of Aotearoa New Zealand/a registered pastor with the New Zealand Baptist Union.

I am inviting you to be part of a qualitative study in which you will have an opportunity to share with me your experiences of being reviewed or appraised in your church ministry. Anything you say to me will be kept confidential and you will not be identifiable in reports of the research.

What is the purpose of this research?

Although ministers are not employees in New Zealand law, they are responsible for their work and encouraged as professionals to reflect on the past and set goals for the future. Such reviews are undertaken in many different formats but could be regarded as a 'performance appraisal' comparable with those of other organisations like businesses or schools. However there may be subtle or significant differences, and I am interested in hearing the 'how' and 'why' of your own experience. The research will be reported in a Master's Thesis and a summary will be provided to you at that time.

Who am I looking for?

Participants need to be parish ministers with either the Baptist or Presbyterian denominations in New Zealand, who have experienced clergy review. 'Clergy reviews' are defined in this project as "the organisational exercise of appraising the minister's performance, undertaken at intervals of 1 – 3 years." I need about fifteen parish ministers who speak English. The national office is forwarding this invitation on my behalf and has not supplied your email address; I will only have your contact details if you respond to this email invitation.

Once you have agreed to participate, I will send you a consent form. We will organise a time for one in-depth interview of 60 – 90 minutes with me. This interview will be at a time convenient to you in a place where you feel comfortable and private, such as your church office. Your thoughts, feelings, memories and opinions are all you need to bring to the interview, though you may if you wish to bring documents relating to a past review. Your interview notes will be kept safe and confidential and I will use pseudonyms in my report. The recorded data and analysis will only be used for this research topic.

What are the benefits?

This research will provide valuable information for me in my postgraduate study. Although it is small scale, it will indicate how some Christian organisations are managing their valuable human resources. Churches and denominations recognise that they need to continually reflect and review on their polity and practice in a changing society. This project's findings will not only allow individual ministers to learn about the experiences of others but provide valuable feedback to churches and denominations about the quality and format of reviews.

How do I learn more or sign up as a participant?

A more detailed Participant Information Form is attached.

Contact Vivian Coleman [REDACTED]

Please respond by the end of February 2015 so I can complete the interviews by 30 April 2015. I am grateful to the Presbyterian Church/Baptist Union for assistance in contacting potential participants.

Regards Vivian Coleman (Rev Mrs)

Appendix 2 - Participant Information Sheet

Date Information Sheet Produced:

27/11/2014



Project Title

Baptist and Presbyterian Ministers' Experience of Performance Review in New Zealand

An Invitation

My name is Vivian Coleman and I am a post-graduate student studying Human Resources for a thesis as part of a Masters of Business at AUT University.

I am also a minister in full standing of the Presbyterian Church of Aotearoa New Zealand, and a registered pastor with the New Zealand Baptist Union.

I am inviting you to be part of a qualitative study in which you will have an opportunity to share with me your experiences of being reviewed or appraised in your church ministry. Your involvement is voluntary. Anything you say to me will be kept confidential and you will not be identifiable in any written reports of the research.

You can withdraw any time before the end of data collection and if you do, I will not use any notes or recordings from our interview.

What is the purpose of this research?

Although ministers are not employees in New Zealand law, they are responsible for their work and encouraged as professionals to reflect on the past and set goals for the future. Such reviews are undertaken in many different formats but could be regarded as a 'performance appraisal' comparable with those of other organisations like businesses or schools. However there may be subtle or significant differences, and I am interested in hearing the 'how' and 'why' of your own experience. The research will be reported in a Master's Thesis and a summary will be provided to you at that time. If a journal article or other publication is contemplated, I will inform you.

How was I identified and why am I being invited to participate in this research?

My participants need to be stipended parish ministers with either the Baptist or Presbyterian denominations in New Zealand, who have experienced clergy review. 'Clergy reviews' are defined in this project as "the organisational exercise of appraising the minister's performance, undertaken at intervals of 1 – 3 years"

I am recruiting participants through your denomination's headquarters in Auckland or Wellington. I need about fifteen parish ministers who speak English. Because of travel constraints, I plan to do most interviews in the North Island of New Zealand, but I also want a reasonable spread of age and gender, so purposive sampling may require travel further afield. Ministers in non-parish contexts like hospital chaplaincy will not be included, because their workplace is so different. I will also exclude my relatives and work colleagues.

I will only have your contact details if you supply them to me voluntarily in response to the nationally distributed email invitation.

What will happen in this research?

Once you have agreed to participate, I will organise a time for one in-depth interview of 60 – 90 minutes with me. This interview will be at a time convenient to you in a place where you feel comfortable and private, such as your church office. The interview will be recorded and transcribed by me or a professional transcriber who undertakes to keep the data confidential. Your thoughts, feelings, memories and opinions are all you need to bring to the interview, though you may if you wish to bring documents relating to a past review. You may decline to answer any question, and you may review the transcribed interview, for correction or clarification, before data analysis is undertaken. The data and analysis will only be used for this research topic and not for any other.

What are the discomforts and risks?

Sharing your experience of past reviews may raise some feelings of discomfort for you. Sometimes a review has led to the end of a ministry relationship, or to anger and pain in yourself and others. Reflecting on the past may also bring up wider issues of loss.

How will these discomforts and risks be alleviated?

If that happens I will take care to support and encourage you. I am a registered pastoral supervisor and if I discern that these issues indicate a need for advice or counselling, I will refer you to the appropriate person, such as your own supervisor.

What are the benefits?

This research will provide valuable information for me in my postgraduate study. Although it is small scale, it will indicate how some Christian organisations are managing their valuable human resources. Churches and denominations recognise that they need to continually reflect and review on their policy and practice in a changing society. Recommendations or regulations regarding ministers' performance and protocols for review are published regularly, and feedback is sought. This project's findings will not only allow individual ministers to learn about the experiences of others but provide valuable feedback to churches and denominations about the quality and format of reviews.

This research will complete my time of study with AUT and is expected to contribute to my being granted the qualification of Master of Business.

How will my privacy be protected?

Another aspect that might provoke distress may be a concern that something you have said will not be kept private. So I undertake that your identifiable interview notes will be kept safe and confidential. I will use pseudonyms with transcription and in my report, and if necessary disguise any details that might point to your identity. I will not report anything specific you have said to your denomination or congregation.

What are the costs of participating in this research?

I am asking for 60 – 90 minutes on top of the time taken to set up this interview.

What opportunity do I have to consider this invitation?

I would like to begin the interviews in February 2015 and have them completed by 30 April 2015.

How do I agree to participate in this research?

Please advise me at [REDACTED] of your decision to participate within the next four weeks so I can contact you regarding our interview time. I will answer any questions and provide a Consent Form for you to fill in and give to me when we meet for the interview.

Will I receive feedback on the results of this research?

A one page summary of the findings of this research will be provided to all participants by the end of 2015, with access to the full thesis being provided at a later date if you are interested.

What do I do if I have concerns about this research?

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Dr Candice Harris, candice.harris@aut.ac.nz or (09) 921 9999 ext: 5102.

Concerns regarding the conduct of the research should be notified to the Executive Secretary of AUTEK, Kate O'Connor, ethics@aut.ac.nz, 921 9999 ext 6038.

Whom do I contact for further information about this research?

Researcher Contact Details:

Vivian Coleman, Email [REDACTED] Mobile [REDACTED]

Project Supervisor Contact Details:

Dr Candice Harris Email candice.harris@aut.ac.nz Work 09) 921 9999 ext: 5102

Appendix 3: Consent Form



Project title: Baptist and Presbyterian Ministers' Experience of Performance Review in NZ

Project Supervisor: Dr Candice Harris, AUT

Researcher: Vivian Coleman

- ☐ I have read and understood the information provided about this research project in the Information Sheet dated 27/11/14.
- ☐ I have had an opportunity to ask questions and to have them answered.
- ☐ I understand that notes will be taken during the interviews and that they will also be audio-taped and transcribed. I may also review the transcript for correction or clarification.
- ☐ I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.
- ☐ If I withdraw, I understand that all relevant information including tapes and transcripts, or parts thereof, will be destroyed.
- ☐ I understand that if the interview raises concerns that go beyond the scope of the research (eg grief), the researcher may discuss with me the option of referring me to my pastoral supervisor or mentor.
- ☐ I agree to take part in this research.
- ☐ I wish to receive a copy of the report from the research (please tick one): Yes ☐ No ☐

Participant's signature:

Participant's name:

Participant's Pastoral Supervisor/Mentor name and contact (to be contacted only with participant's express permission)

Participant's Contact Details:

.....
.....
.....
.....

Date:

Approved by the Auckland University of Technology Ethics Committee on 17 November 2014, AUTEK Reference number 14/362

Appendix 4: Clergy Review 2015 Indicative Questions

Where two options are given, the first wording is for Presbyterian participants and the second for Baptist pastors.

1. Rapport Building and Demographic Questions

Hi..... I'm Vivian Coleman and I am a post-graduate student studying Human Resources for a thesis in Masters of Business at Auckland University of Technology. I am also a minister in full standing of the Presbyterian Church of Aotearoa New Zealand/a registered pastor with the New Zealand Baptist Union.

This interview is part of my qualitative study where I hope you will share with me your experiences of being reviewed or appraised in your church ministry. Anything you say to me will be kept confidential and you will not be identifiable in any written reports of the research. You can withdraw anytime up until completion of data collection and if you do, I will not use any notes or recordings from our interview. You will also be offered the opportunity to review the transcript for correction or clarification.

The definition of clergy review for this study is "a planned review and reflection on past work and future goals, a discussion of an employee's performance of assigned duties and responsibilities". I am interested in planned reviews, whether an internal process led by elders, or a 360 review by an outside professional, that take place on an annual or three yearly basis.

Let's just note some basic details as background to the wider questions of your experience of Ministry Review/Pastoral Review:

- Are these your contact details?
- What is your age and number of years in ministry?
- Do you have pastoral supervision and if so, how often do you utilise it?
- Tell me how governance and accountability are managed in your church.....

Using the definition of clergy review that I am using for this study:

- How many reviews have you had? At what times?
- Who initiated them? Who conducted them?
- Who else was involved? Who received the final report?
- What tools were used? Eg self-review, scales, member comments, etc.
- What preparation and/or follow-up was involved?

2. Open Questions for interpretive description and grounding theory (to be used only if needed as prompts):

- Tell me about your experience of ministry review?
- What are your thoughts about the how and why of reviews? Are they an experience you value?
- How did you respond to the experience? Looking back, do you notice any changes that came about in your practice of ministry?
- Were there any surprises?
- How did your reviews impact relationships with others?
- How does pastoral supervision connect with your review experience?
- Have you yourself conducted ministry reviews? Tell me about those?
- Do you see God at work in these reviews? How?

Appendix 5: Bible References relating to evaluation

I acknowledge that these are not “proof texts” but should be interpreted in context.

Elders at the town gate:

Shechem went with his father, Hamor, to present this proposal to the leaders at the town gate.

(Gen 34: 20 and others)

Meaning of Christian message:

Christians understand the death and resurrection of Jesus to be the final answer to the need for reconciliation between Creator and created.

Therefore, since we have been made right in God’s sight by faith, we have peace with God because of what Jesus Christ our Lord has done for us. (Romans 5: 11).*

The kindness and sternness of God:

God is both kind and severe. He is severe toward those who disobeyed, but kind to you if you trust in his kindness. (Romans 11: 22)

Jesus was both kind and stern:

He condemned the Pharisees for their hypocrisy, and judged his own disciples for their greed and hubris, yet affirmed a prostitute’s worship, and saved the life of a woman caught in adultery **(Matthew 23: 27f, Mark 10; 37f, Luke 7: 37 – 48, John 8: 3- 11).**

Accountability:

All Christians are expected to have a realistic assessment of their gifts and to give account of how they use them, and leaders even more so **(Matthew 25: 14 – 30, 1 Peter 4: 10, 1 Corinthians 4:1 – 2).**

We are servants of Christ, the ones God has trusted ... with something valuable,.. and who must show we are worthy of that trust.” (1 Cor 4: 1 -2)

Leadership:

Church leaders were asked to undertake certain functions and tasks or roles, based on their God-given leadership gifts

Here are some of the parts God has appointed for the church: apostles, prophets, teachers, those who do miracles, those who have the gift of healing, those who can help others, those who have the gift of leadership, those who speak in unknown languages. (1 Cor 12: 28)

Leaders are accountable:

Like false leaders in the Hebrew Bible, leaders are warned about words and deeds that could lead people astray **(Ezekiel 34, Matthew 18: 6).** Elders were to be caring and humble.

Care for the flock that God has entrusted to you. Watch over it willingly, not grudgingly—not for what you will get out of it, but because you are eager to serve God. Don’t lord it over the people assigned to your care, but lead them by your own good example (1 Peter 5: 3).

Paul gave advice to churches and leaders:

All the brothers and sisters here join me in sending this letter to the churches of Galatia (Gal 1: 2) and others.

An elder must be above reproach, and those who work hard should be respected and paid well, especially preachers (1 Tim 3: 2, 5: 17).

Forgiveness, grace and balance between gentleness and confrontation

Gently and humbly help that person back onto the right path (Gal 6: 1)

Those who sin should be reprimanded as a strong warning to others (1 Tim 5: 19 – 21).

The priesthood of all believers

You are a holy priesthood, offering spiritual sacrifices acceptable to God (1 Peter 2: 5)

Appendix 6: Participant Pseudonyms and other demographic data

The pseudonyms were generated in an alphabetical list and assigned randomly as interviews were conducted.

Name	Denomination	Gender	Age 40's to 60's	Years in Ministry	Number of reviews
Ethan	Presbyterian	Male		22	2 plus Quinquennial
Reuben	Presbyterian	Male		35	2 plus Q
Noah	Baptist	Male		22	2
Samuel	Baptist	Male		10	2
Caleb	Baptist	Male		5	4
Obed	Baptist	Male		12	9
Deborah	Baptist	Female		6	2
Hannah	Presbyterian	Female		22	2
Jacob	Presbyterian	Male		27	1 plus Q
Tobit	Baptist	Male		20	5
Zara	Presbyterian	Female		26	2 plus Q
Levi	Presbyterian	Male		26	2 plus Q
Baruch	Presbyterian	Male		17	1 plus Q
Avi	Baptist	Male		37	5
Micah	Presbyterian	Male		23	2 plus Q

Appendix 7: Presbyterian Minister Job Description dated 2004

XYZ Presbyterian Church 2004

Roles	Goals	Pointers
Worship Planner and Leader	8am monthly 9.15 am Sunday 11 am Sunday 7 pm Sunday 10 am Thursday Special events eg jubilee/inductions Weddings and funerals	<ul style="list-style-type: none"> <input type="checkbox"/> Weekly worship service is presented with blend of music, Biblical teaching, prayer, and life skills <input type="checkbox"/> Liturgy and selection of music appropriately reflects ecclesiological tradition <input type="checkbox"/> Rostered tasks are overseen in liaison with administrator <input type="checkbox"/> Multimedia used when possible; PowerPoints are an aid not distraction, spelt correctly, and geared to the audience <input type="checkbox"/> Interactive style used when appropriate <input type="checkbox"/> Session vision and goals are taken in to account in preparation of worship services and messages <input type="checkbox"/> Service is completed within agreed time parameters 90% of the time <input type="checkbox"/> Roster for 9.15 musicians is designed and payment is attended to where appropriate <input type="checkbox"/> Organ/piano accompaniment is provided as needed <input type="checkbox"/> Talents of participating worshipers recognised and utilised <input type="checkbox"/> Prayerfulness prior to services is encouraged <input type="checkbox"/> Opportunity for response (altar call) is monitored <input type="checkbox"/> Prayer counselling utilises clean language models <input type="checkbox"/> Consultation with families involved enables a suitable liturgy to be offered.
Minister of Word	Bible in Schools Girls Brigade Rest Homes	<ul style="list-style-type: none"> <input type="checkbox"/> Sermons/studies are Biblically focussed, with relevant interpretation and application to daily life <input type="checkbox"/> Presentation is clear, engaging and age-appropriate <input type="checkbox"/> Rigorous research is undertaken into theological and socio-political issues through wide reading of books journals and internet resources <input type="checkbox"/> Preaching roster is overseen and quality of speakers and theology monitored (through Ministry Team) <input type="checkbox"/> Sermon responsibility is undertaken at 80 % of 9.15, 50% of 10am, and once a month at other services <input type="checkbox"/> Input from church attendees is utilised in speaker selection Payment to outside speakers is attended to <input type="checkbox"/> Multimedia style and Interaction utilised when possible <input type="checkbox"/> Selection of themes and illustrations are age-appropriate <input type="checkbox"/> Sermon script is available to those who request it <input type="checkbox"/> Weekly RE teaching at local state school to model values and support other teachers <input type="checkbox"/> Chaplaincy role is fulfilled by monthly leading of devotions, CE badge work as needed and conduct of special church services twice a year <input type="checkbox"/> Minister provides 30 minutes music and devotions at XX (monthly) XY and XZ (quarterly).
Minister of Sacrament	Communion	<ul style="list-style-type: none"> <input type="checkbox"/> Appropriate liturgy is planned and communion celebrated according to monthly (8am) and quarterly (9.15, 11, 7, 10) timetable <input type="checkbox"/> Appropriate liturgy is planned and communion is conducted on shared basis for bilingual communion with ZZZ at least once a year <input type="checkbox"/> Ministerial cover is arranged for sacrament if absent <input type="checkbox"/> Home communion is delivered to shut-ins on a regular basis <input type="checkbox"/> Session is formally constituted prior to Quarterly Communion Season <input type="checkbox"/> Minister participates in roster for providing 30-minute communion service at XX Rest Home twice a year. <input type="checkbox"/> Parents requesting Christian initiation for children (baptism or thanksgiving) are visited at home and appropriate format is negotiated

Team Leader and member	Baptism and Confirmation	<input type="checkbox"/> Recommendation to Session, if baptism judged appropriate, is followed by conduct of sacrament in public worship <input type="checkbox"/> Where baptism not involved, thanksgiving/ blessing is conducted in church or home and reported to Session <input type="checkbox"/> Potential baptism and confirmation candidates are sought, and invitation to explore the matter in Next Step class offered on a regular basis <input type="checkbox"/> Instruction administered to interested believers several times a year as needed <input type="checkbox"/> Recommendation to Session, if baptism or confirmation judged appropriate, is followed by professions of faith in context of public worship <input type="checkbox"/> Provision is made for those wishing to be immersed <input type="checkbox"/> All baptisms/thanksgivings are recorded in the register <input type="checkbox"/> Instruction/induction to core values is administered on quarterly basis to those transferring from other congregations <input type="checkbox"/> New members are invited to a members' lunch with selected elders, lunch is organised and hosted at least twice a year <input type="checkbox"/> Regular meetings with Session Clerk ensure communication and alignment <input type="checkbox"/> Session Agenda is prepared in consultation with Clerk and Administrator <input type="checkbox"/> Session correspondence is assessed and response considered before Session meeting <input type="checkbox"/> Session and Council meetings are constituted and moderated with an appropriate degree of formality/ informality <input type="checkbox"/> Agendas for congregational meetings are prepared as needed according to Book of Order <input type="checkbox"/> Congregational meetings are constituted and moderated with an appropriate degree of formality/ informality <input type="checkbox"/> Presbytery is advised of matters over which it has jurisdiction <input type="checkbox"/> Recruitment of new elders is undertaken with appropriate consultation and instruction <input type="checkbox"/> New elders are ordained or inducted in an appropriate manner, after statutory obligations are fulfilled
	Session Liaison	<input type="checkbox"/> Ministry Report is submitted monthly to Session and annually to the congregation <input type="checkbox"/> Weekly meeting with on-site staff takes place for communication, review and prayer <input type="checkbox"/> Administrative Staff are provided with practical support <input type="checkbox"/> Appropriate contribution is made to Job Descriptions, contracts and appraisals of staff
	Staff Liaison Meeting	<input type="checkbox"/> Fortnightly oversight of ministry staff is undertaken in accordance with job description and time commitments, via one on one report <input type="checkbox"/> Alignment with core values and Presbyterian heritage is encouraged through regular communication /training <input type="checkbox"/> Temperaments and spiritual gifts of ministry staff are discovered and valued <input type="checkbox"/> Ministry Staff are provided with practical support
Pastoral Care	Ministry Staff	
	General	<input type="checkbox"/> Empathic listening is offered in pastoral contexts <input type="checkbox"/> Caring non-judgmental support characterises response <input type="checkbox"/> Genuine interest is shown in individuals, by expression of warmth and approachability <input type="checkbox"/> Self disclosure is used appropriately <input type="checkbox"/> God's grace and forgiveness are communicated <input type="checkbox"/> Trust and transparency are modelled <input type="checkbox"/> Congruence between beliefs and behaviour is demonstrated <input type="checkbox"/> Ethics standards of PCANZ and local Church are complied with in pastoral situations <input type="checkbox"/> Local hospital is visited on a regular (fortnightly) basis <input type="checkbox"/> Members suffering from terminal illness are visited <input type="checkbox"/> Members in medical or family crisis are visited or counselled in office <input type="checkbox"/> Members or worshippers suffering loss as visited at home and an appropriate funeral liturgy is provided
	Ministry with sick	
	Ministry with people in crisis	
	Ministry with the bereaved	

	Ministry with felt needs Ministry with Elderly Ministry with Parents Ministry with conflict resolution Discipline of members	<input type="checkbox"/> Fringe contacts and those with no relationship with the church are catered for if time permits <input type="checkbox"/> A time of remembrance for the departed is included in each annual meeting <input type="checkbox"/> Members or worshippers are able to schedule counselling/ministry time with minister <input type="checkbox"/> Awareness of need for personal counselling is followed up by proactive strategy by minister or elder <input type="checkbox"/> Practical needs eg emergency meals, food parcels are made known to the relevant individual or team <input type="checkbox"/> Pastoral care of elderly is offered through regular meeting with Thursday service, seniors group etc <input type="checkbox"/> Home Visiting of elderly is available on request <input type="checkbox"/> Pastoral care of young parents is offered through regular meeting with Tuesday group, Mainly Music etc <input type="checkbox"/> Home Visiting of parents is available on request <input type="checkbox"/> Ministry with preschoolers is offered according to gifts and skills (eg Mainly Music) <input type="checkbox"/> Mediation skills are used and no-lose solutions sought in situations of conflict <input type="checkbox"/> Instances of error or inappropriate conduct are identified with other elders and action taken <input type="checkbox"/> Action may include prayer, personal communication, small group challenge, or formal discipline. <input type="checkbox"/> PCANZ regulations covering judicial matters are adhered to in a context of hope and grace
Administration	Filing Management/ Finance	<input type="checkbox"/> Appropriate filing systems (hard copy and digital) are used to enable retrieval of sermons and liturgies, correspondence and governance records <input type="checkbox"/> Records are kept of phone and car use and reimbursement claims made monthly through the Treasurer. <input type="checkbox"/> Email and post is checked daily and a response made within an appropriate time frame <input type="checkbox"/> Clear records of appointments and other time-sensitive matters ensure timely responses <input type="checkbox"/> Relevant church meetings attended or apology submitted <input type="checkbox"/> An appropriate storage system is used for home group studies and other shared resources <input type="checkbox"/> A clear understanding is held of the structures of the local regional and national church <input type="checkbox"/> Referrals are made to relevant teams of individuals in matters of property and finance <input type="checkbox"/> Information is provided in a timely manner to the Treasurer to assist in the preparation of annual budgets for Ministry, Worship, Youth and Adult Education Teams <input type="checkbox"/> Monies paid for services rendered are promptly remitted to the Treasurer <input type="checkbox"/> Reimbursement for monies expended on church matters is claimed via the appropriate claim slip with GST receipt <input type="checkbox"/> Familiarity with all office technology (computer, database, photocopier, intranet, website) facilitates smooth operation of administrative functions and support of staff <input type="checkbox"/> Familiarity with sound and projection technology facilitates good working relationship with relevant teams

Communication	Weekly Bulletin	<input type="checkbox"/> Weekly service details are provided to administrator and technicians by Thursday of each week <input type="checkbox"/> Song choices and sheet music are provided to organist /musicians by Wednesday of each week <input type="checkbox"/> Weekly opinion editorial (minister's message) is provided on Friday of each week <input type="checkbox"/> Matters needing to be included in weekly notices are highlighted to administrator on a regular basis. <input type="checkbox"/> Weekly bulletin is proofread before publication <input type="checkbox"/> Monthly service details are provided to administrator by 25th of each month <input type="checkbox"/> Monthly opinion editorial (minister's message) is provided by 25 th of each month <input type="checkbox"/> Matters needing to be included in monthly notices are highlighted to administrator on a regular basis. <input type="checkbox"/> Articles of Christian interest are provided for monthly publications as needed; themes are determined in advance, in consultation with the appropriate team <input type="checkbox"/> Relevant communications from Session Council are provided for inclusion in newsletters <input type="checkbox"/> Relevant communications from the national church are provided for inclusion in newsletters <input type="checkbox"/> Monthly newsletter is proofread before publications <input type="checkbox"/> Annual Ministry Report and Ministers Forward are provided to administrator in July of each year <input type="checkbox"/> Annual Report is proofread before publication <input type="checkbox"/> If copying delays are experienced, weekend publication is undertaken on behalf of Administrator <input type="checkbox"/> Monthly service details provided to website by 1 st /month <input type="checkbox"/> Regular additions are made to photos and news items <input type="checkbox"/> Site is checked regularly for accuracy, and accessibility
	Monthly newsletter	
	Annual publication	
	Website	
Funeral Celebrant		See relevant goals in worship leading and pastoral care. <input type="checkbox"/> Liaison with musicians technicians and florists is facilitated, where possible through the office administrator
Wedding Celebrant		<input type="checkbox"/> Couples wishing to be married are interviewed and an appropriate liturgy prepared <input type="checkbox"/> At least two evenings premarital counselling is provided as a prerequisite <input type="checkbox"/> Liaison with musicians technicians and florists is facilitated, where possible through the office administrator <input type="checkbox"/> If minister is not involved in wedding, agreement to use of a celebrant is required and a list of protocols is provided <input type="checkbox"/> Church register is to be used for all onsite weddings and off site services where minister is officiating
Presbytery responsibilities	Local Presbytery	<input type="checkbox"/> Meetings (full and regional) are attended regularly or an apology submitted <input type="checkbox"/> Minutes and agenda are read and any relevant responses made in timely manner <input type="checkbox"/> A contribution is to be made to at least one committee of the Presbytery <input type="checkbox"/> Reasonable requests from the Moderator or Clerk are complied with, eg representing Presbytery at local inductions <input type="checkbox"/> Good relationships with ministerial colleagues in the region are cultivated <input type="checkbox"/> Good relationships with ministers and elders of ZZZ are cultivated <input type="checkbox"/> Communication is attended to, on an informal basis wherever possible <input type="checkbox"/> Joint Liaison meetings are arranged and attended, at least twice a year, and minutes are taken and distributed <input type="checkbox"/> Requests from ZZZ for preaching or writing tasks are responded to in a ready and warm fashion
	ZZZ (joint use) Church	

		<input type="checkbox"/> Needs and preferences of the ZZZ are taken into account when planning services and other use of facilities
PCANZ responsibilities		<input type="checkbox"/> Nomination to Assembly committees or tasks is prayerfully considered and where possible a positive response made <input type="checkbox"/> Assembly responsibilities are fulfilled alongside normal parish work <input type="checkbox"/> General Assembly is attended as required by parish or presbytery and a verbal and written report presented in timely manner <input type="checkbox"/> Correspondence from the Assembly is passed to the appropriate court or team <input type="checkbox"/> Regulations and protocols set by the Assembly are complied with
Local Clergy contact		<input type="checkbox"/> Monthly meetings of local Ministers Association are attended on a regular basis. <input type="checkbox"/> Meeting is hosted once a year <input type="checkbox"/> Minutes are read and matters of interest communicated to the relevant court or team <input type="checkbox"/> Special meetings eg prayer summit, are attended where possible <input type="checkbox"/> Colleagues of other denominations are treated with respect and forbearance
Community Contacts	Facility Users	<input type="checkbox"/> Communication and liaison is undertaken with facility users where possible <input type="checkbox"/> Support is offered in response to requests eg saying grace, playing piano
Evangelism		<input type="checkbox"/> Participation in evangelistic activities according to gifts and skills eg running the Alpha programme
Prayer	Spiritual Direction Corporate Prayer Private Prayer Prayer Ministry	<input type="checkbox"/> Spiritual direction is undertaken on at least a monthly basis <input type="checkbox"/> A day Retreat is undertaken at least once a year <input type="checkbox"/> Opportunities for corporate prayer are led or supported <input type="checkbox"/> The prayer chain is utilised on a regular basis <input type="checkbox"/> Private prayer life is vigorous and intentional <input type="checkbox"/> Decisions are considered in a prayerful manner <input type="checkbox"/> Prayer is offered to parishioners, counselees and colleagues at significant moments <input type="checkbox"/> The Prayer Care Model is used appropriately
Professional Development	Supervision CMF Study Leave Resource Repository	<input type="checkbox"/> Professional supervision is accessed at least monthly <input type="checkbox"/> Annual formative review is undertaken in consultation with Session <input type="checkbox"/> Summative review is undertaken as and when required by Presbytery (quinquennial visitation) <input type="checkbox"/> Appropriate continuing education courses are attended to fulfil Presbytery CMF requirements <input type="checkbox"/> Elders have input into professional development in order to address inadequacies identified <input type="checkbox"/> Study leave is taken every second year in compliance with Presbytery requirements <input type="checkbox"/> Books read are made available to parishioners in the interest of sharing resources

Appendix 8: Samples of Interview Style, February 2015

A: Page 11 of Interview 1501 transcript

1501	And honestly, you know, I'm not trying to be rude, but these guys, one in particular, can barely look after himself and I think – how can you actually – how could you review anybody? I've known him for 20 years. And that sounds awfully judgmental and horrible, and I apologise to the tape, but it's true actually and it worries me.
Vivian	<i>No, these are the kind of concerns that we need to look at, as well as all the positives, yeah.</i>
1501	Yeah. But you know, these other two have never had a phone call. In fact, the guy said ---Oh, I'm not going to bother doing it any more 'cos nobody's bothered. I thought – that's a real loss
Vivian	<i>Mm, I'm shocked by that, yeah.</i>
1501	I mean, he was actually asked by (<i>business</i>) to go and review or walk alongside and mentor some of the top leaders in that business, if you like, 'cos that's what he's good at. I mean, you know, come on!
Vivian	<i>So maybe there needs to be a little potted biography next to each of the names.</i>
1501	Yeah, maybe something, yeah.
Vivian	<i>Cos there isn't anything like that.</i>
1501	Maybe a star ranking!
Vivian	<i>Well, yes, that might be a little bit more problematic....</i>
1501	That might be a problem.
Vivian	<i>Yeah, an interesting thought. People are just going for a name they recognise and if they don't recognise the name, it's interesting.</i>
1501	Yeah, 'cos they also go for reviewers who are close at hand, so it doesn't cost so much.
Vivian	<i>Yeah, that's true. Within (city).</i>
1501	Yeah, I know, yeah that's right, yeah.
Vivian	<i>So tell me a bit about how supervision and your review experiences overlap. You gave the report to your supervisor?</i>
1501	Yeah I did. And you know, that was really helpful??. She looked through it and there were sort of one or two things that we then talked about which was good. And also, this business – I mean, it was nothing to do with us really but this business of... There was some really positive stuff in there which was great. I mean, I don't want the negative stuff, but you know, I always find that difficult to deal with, which is just me. She helped me through that too and deal with that.
Vivian	<i>To deal with some negative things?</i>
1501	No, positive things.
Vivian	<i>With the positive things?</i>
1501	Yeah, yeah. I mean, that sounds...
Vivian	<i>Do you find it difficult to celebrate your strengths?</i>
1501	I do.
Vivian	<i>Ok.</i>
1501	Yeah, that's one of my problems. It's one of the problems that the reviewer said too, so I don't know – probably to do with – it's part of my nature I guess. Maybe my age, 58, too late. Probably too late to change things. But it was good to actually recognise it and address it as much as I could, so that's quite neat, so in some ways I can actually accept that. I mean, I love doing that to other people, I really do, you know? But yeah, when the roles are reversed I find it difficult. But I'm just odd. Yeah. So that was good, it was another good outcome because it gave something else we could talk about in the supervision role....+ ten more lines of 1501

1503	The other essential ingredient from my point of view coming from a work background is that your performance review is part of an agreed moving forward to get a plan
Vivian	<i>It's not just reviewing, it's previewing, yeah.</i>
1503	There's a sense, it's kind of like a mile marker along the way and I also subscribe to the management principle of no, what they call a 'no surprises' rule. So if a person is surprised by what they hear in their performance review, the management processes have been poorly led. It should really be a summary of what they already know.
Vivian	<i>I agree. Yeah. And yet many people would get surprises because probably a lot of reviews happen when the congregation have got something they want to say to the Minister and don't know how to say it.</i>
1503	Yeah, drum, drums are beating.
Vivian	Yes.
1503	But the other thing too is that elders often don't really work closely enough with a Senior Pastor to kind of really observe them on a daily basis and they get little snapshots when he's at his best and when he's at his worst, but they don't see him in his everyday life.
Vivian	<i>No, and they can't because so much of it is private, confidential, inward work when you're, for example, writing a sermon, it's not something that anyone can observe.</i>
1503	But the other thing too is that there's fuzziness about what they really want you to achieve. They have all sorts of anecdotal thoughts and private expectations but they haven't really nailed that down. So when it comes time to measure your performance what are they measuring it against?
Vivian	<i>The minister next door or a past minister or ...</i>
1503	Yeah, all sorts of things. So it should be part of, so the one I do with (<i>staff member</i>) is part of her strategic planning process, so it's about thinking, looking back about how she's going, where she's at and it's also a part of the performance review cycle, it's about periodic tuning in. But I mean I meet with her every week so there's really no surprises and we keep really short accounts, there's no nasty surprises there. In fact, one of the biggest difficulties with my performance review of her is finding anything new to say.
Vivian	<i>(laughs) Because as you say, everything is out in the open.</i>