

Survey-Feedback in Parishes

Survey-Feedback is an OD¹ method for collecting and analyzing information about an organization making use of a survey or questionnaire. The method has two primary objectives: 1). A tool in the improvement of the parish and 2). A tool that helps the working relationship between parish leaders and members. It is one among several methods used by OD practitioners along with interviews, observation, and group exploration & discovery processes. Cummings and Worley see it as one of the "stems of OD practice."² The method is a tool in action research, i.e., a methodology which is intended to have both action outcomes and research outcomes.³ We want the parish to improve its life and ministry and at the same time for leaders and members to increase their understanding of parish purposes and dynamics. Survey-feedback processes are directly related to the mission of the church. They are about our unity in Christ, how it is lived and shared.

A typical survey–feedback process

Here's a way the survey–feedback process might be done in a parish

1. Prepare a Survey Based on a Model or Theory

Members and leaders prepare a survey, possibly in collaboration with a consultant. Sometimes the consultant will design the survey and test it with parish leaders. Or the consultant may facilitate a process in which leaders and/or members indicate the concerns and issues they hope will be reflected in the process; then the consultant designs the survey with that information in mind.

State the objectives of the process. Be clear about the role of the survey-feedback process within that larger process. What group will you survey – all active adults, those willing to participate in the feedback session, the vestry, parents and children? Consider the theoretical base for what you are doing. Identify a model, related to the theory; use it creating a survey

¹ OD – Organization Development – "Organization Development is a response to change, a complex educational strategy intended to change the beliefs, attitudes, values, and structures of organizations so that they can better adapt to new technologies, markets, and challenges, and the dizzying rate of change itself." Warren Bennis, 1969 or "Organization development is a system-wide application of behavioral science knowledge to the planned development and reinforcement of organizational strategies, structures, and processes for improving an organization's effectiveness." Cummings and Worley, *Organization Development and Change*, 6th Edition, South-Western Publishing, 1997, p.2.

² Cummings and Worley, *Organization Development & Change*, 6th edition, Southwestern College Publishing, Cincinnati, 1997. on survey feedback -page 7 – 11; fuller description of the process pp. 133 – 139. Rothwell, Sullivan & McLean in *Practicing Organization Development*, Pfeiffer & Co, 1995 write that the process has its roots in the work of Rensis Likert who noted that organizations seemed to have an "ask-but-don't-act" approach which increased the frustration of members more than not asking in the first place. Likert demonstrated how information can be collected from members and used in problem solving and action planning. p.26 - 29

³ Action research emerged in the 1940's as social scientists saw the need to link research and action if they expected organizational members to both use the research in managing change and as a source of motivation. OD practitioners often speak of "letting the data speak." This is an acknowledgement of the relationship among factors such as data collection and diagnosis, participatory processes, the need for internal ownership and commitment, and effective change efforts. Action research is useful in situations where you want to bring about action toward change, and at the same time increase your understanding of organizational dynamics.

that is broad enough to explore the parish as a system, e.g., Renewal-Apostolate Cycle, Four Key Elements of a System, Trust Development in Organizations, etc.

Don't ask for information you are not really open to hearing and acting on.

2. Administer the Survey

Administer the survey to all members of the group you have agreed to include in the process. Because the process includes the feedback meeting as an essential element of the change process it may be useful to limit the survey distribution to those who have signed up to attend the feedback session. If the survey is short enough it is more likely to produce energy and follow-up investment by administering the survey as part of the same gathering in which the feedback occurs.

3. Prepare for & Design the Feedback Process

This includes collating the data, initial diagnostic work by the consultant or team conducting the process, and designing the feedback meeting.

Surprising parish leaders with the data is not useful. Anticipate how the priest and/or other leaders are likely to respond to the data. Minimally the rector or vicar is contacted before any feedback meetings and given an overview of the data and alerted to any potential areas of tension. In some cases it makes sense to have a feedback meeting with the rector and/or rector and vestry before conducting a more public and larger group feedback meeting.

In preparing for the feedback session itself you will need to think about what turn-out by members will you see as successful; and the meeting needs to be designed.

If the process is related to the life of the whole parish a reasonable goal for attendance is all key leaders and around 25 – 30% of the average adult Sunday attendance. If you are operating with a standard that only those who have signed-up to attend the meeting are asked to complete the survey; then you will know what level of participation to expect before the surveys even go out.

Design the meeting – state the objectives; think through activities, time, and resources needed; decide on what level of participation is possible at various stages. The meeting needs structure and flexibility. Be prepared to let go of some activities in order to focus on things that are drawing the interest and energy of the group.

4. Feedback Meetings

The meeting needs to be facilitated by a person or team with good facilitation skills and the ability to stay non-reactive in the face of the emotions that the process might release. The facilitator's job is to help the group explore the data, assess what it means, see the strengths and weaknesses of the parish, possibly do some strategic thinking about the future, and identify next steps. The best results are usually achieved with the use of a trained consultant as a facilitator. Trained OD or congregational development consultants are often able to help the parish see more deeply into the dynamics and possibilities than someone with more limited training.

It may be useful to have feedback meetings with several different groups to assist each in connecting the data and analysis to that group's responsibilities, e.g., a survey on the parish's spirituality and practice of hospitality might include a session with the rector (exploring her impact on hospitality, as a person and in her role), with greeters (behavior at the Eucharist that is warm, allows "space" while being attentive), with rector and vestry (what is the hospitality of the vestry in its own life; any issues of budget), and so on.

5. Follow-through Action

Survey-feedback processes do require small group follow up activities. Working groups begun at an open meeting can stay with the project for a few months and leaders will need to monitor movement and make adjustments.

Elements of Survey-Feedback

Participatory -- Participation of those that will be impacted by the change is done for three reasons 1). It is just; 2). It usually increases ownership and commitment to the change. This, in turn, usually increase the effectiveness of the change effort; and 3). On many occasions the diagnosis, discovery and learnings are richer.

If you survey people report the results back to them; don't gather information that only a leadership group then explores.

You increase the relationship between data gathering, analysis, setting direction, and taking action when you do it all at the same time; a day long parish town meeting in which data is collected and explored by those present increases the community's energy for follow through; avoid the compulsion to survey everyone on the membership roles (the costs are rarely worth the pay-off and such processes separate the data from responsibility or action.)

You are seeking participation by those likely to be impacted by a change – in parish with significant number of summer members appropriate to survey re summer experience but not in terms of year around – so if year around congregation desire growth, not up to summer congregation to say "no; or worship survey with 8 and 10 congregations -

Practitioner – Member Collaboration – Survey-feedback assumes that there is someone in the picture with OD training and some experience with the method. That person may be an external consultant, the rector, or a parishioner. While the role will impact how the practitioner's knowledge will be used; our concern at this point is that there be such a person who might offer the necessary competence to the effort, e.g., theory base, experience with the process, broad understanding of systems and parish dynamics, etc. The degree of collaboration will depend on issues like the parish's readiness for the change that may take place, the time available, and the willingness and ability of members to participate.

Cyclical – What is learned in the early phases is used to develop new survey's that broaden or deepen our understanding. Our initial questions may be fuzzy and imprecise because that is where we are at that point. Survey-feedback, as an action research method, assumes we will

refine our questions and methods as we go along. We may even shift from survey–feedback to another method.

A Mix of Qualitative and Quantitative – A qualitative approach leads us into looking at human behavior in the context in which it occurs; accepts a participant-observer stance with its perspective that those doing the research and learning are at the same time effecting the system by their presence and activity. The quantitative element accepts the need a theoretical base to integrate and explain dynamics and relationships; seeking some degree of reliability and validity in the process. Survey-feedback is interested in both but leans more on the qualitative side.

Based on Theory or a Model – This helps in understanding what is being explored in system terms; in seeing the relationship among elements of the parish system.

Reflective – We are trying to learn from our experience as a parish; to see my deeply into the hidden dynamics and forces of our life together. What we are doing can be understood as an act of discernment.

Trust development -- Depending on the trust level already existing in the parish:

- You may want an external consultant to administer the survey, design the process, and facilitate the feedback meeting or you may want the consultant, or other OD practitioner, to coach a parish team through the steps.
- People might be asked to sign or not sign the survey.

In addition to the specific purposes of this particular survey-feedback process you also need to take into account the impact of the process on other parish dynamics such as trust. You don't want to do this in a way that underestimates the trust level, and in so doing sets it back; or to assume more trust than is present, and thereby cause an anxious reaction.

Getting the Best Results

The effectiveness of the survey-feedback process in contributing to positive changes in an organization is dependent on factors such as⁴:

1. The competence of the people managing the change effort
2. Being used along with other OD interventions, especially team building
3. Member's understanding the process
4. The extent to which the survey focuses on issues that are important to participants
5. The degree of congruence between values expressed in the survey and the values of the participants
6. When key leaders are actively involved in feeding the data back and helping people work through the data
7. When members are involved in developing and carrying out the process
8. Continued, periodic use of the process

⁴ Cummings and Worley, pp. 138 – 139; Harvey and Brown, *An Experiential Approach to Organization Development*, 5th ed., Prentice Hall, Upper Saddle River, NJ, 1996, p. 383

These measures might be looked at in terms of achieving as many as possible in a specific situation. There are usually limitations of time, finances and competence that may necessitate a process with fewer of the elements.

Common misuses in the parish

- Thinking that all change efforts must include participation – Rector's and vicars need to use their judgment about when a participatory process is best and when to simply make the change and ask people to work with it. Which to do when will depend on factors such as -- where the parish is in its life cycle (e.g., health and stable, in decline, etc.); a sense of which change efforts need the time involved in a participatory process;
- The leadership, clergy and lay, having a limited range of leadership styles that they use in situation after situation. So, they are always inclined to participation or to non-participation.
- That everyone needs to be included – This is usually a sign of excessive anxiety in the parish and/or a sentimental view of parish community
- Too little face-to-face, two-way processes
- Doing surveys about everything – doing surveys about nothing
- Lack of judgment about when it is worth the time. Survey feedback processes takes time. It draws leaders and members away from other activities needed for the maintenance of parish life and ministry. It is true that well conducted processes usually end up increasing organizational effectiveness and efficiency.
- Survey without the feedback -- a survey-closed discussion processes; leaders only
- Asking questions you will not take action on
- Using poorly trained consultants – Many of the change processes use in the church today are packaged events facilitated by people with very little training. In some cases this can result in damage to the parish's life and ministry, in other cases it is simply a waste of time, in almost all cases it means that the potential of the process is reduced.

When to do just a survey with no feedback session (or when to not do survey-feedback)

There are some occasions when it is appropriate to do a survey but to forgo the feedback session. Here are a few examples.

- As rector you would like information about worship but you are sensitive to the danger of making worship "an issue." You want to avoid the damage that can be done to people's participation in worship by making it the matter of debate or a vote. A group of apostolic faith and high emotional intelligence could enter into a productive exploration of worship issues. It might be very useful if you could gather such a group for a one time session that would help you review the survey results. If possible you may still want to feedback the results to those that filled out the survey but do that 1). In written form not at a meeting and 2). With comments about what you are doing with the information.
- The survey would be around an issue that is already "hot." You want to avoid fanning flames by having a public feedback session.
- It is related to a change process that is in motion but not institutionalized. Your hunch is that to have a feedback session would disrupt the parish's energy and focus on the change process. At the same time there is information you could use from a survey that might lead to mid course corrections in the change process.

In each of the above cases it is probably appropriate to offer an introduction to the survey that includes statements such as: "The information you provide will be used, by the rector and others responsible for this area of the parish's life and ministry, in better understanding the parish's desires and needs, and in related decision making."; "Once this survey has been collated and reviewed the results will be feedback to you in some form."

You also need to accept that some people will be unhappy with this process. They may be frustrated at not being given an opportunity to vent; or so certain that they are "right" about the issue that they see no reason for leaders to hear the viewpoint of others; or simply uninformed about the complexity of survey-feedback work.

There are also times when a survey is not appropriate. For example, when trust is so low and/or tensions so high that the need is really for a third party consultant that works with the various groups before any survey is used.

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