



360-degree reviews for churches?

TN144 Training Notes series: Management

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The default system for reviews for employees (often known as ‘appraisals’ or, increasingly, ‘Personal Development’ (or ‘Performance’) Reviews, is an annual or six-monthly session with one’s line manager. Training Notes TN17, *Twenty questions for an annual review*, offer help to help church managers with this.

But a line management interview is not the only possible method and what is usually known as a ‘360-degree’ (ie. all round) review has gained ground in recent years. These notes explain how this works and investigate its possible application to Ministers, to employed church staffs, and even to volunteer ministry leads and church office-holders.

1 What is it?

Before we jump to any application in a church sphere it is important to understand how such a review works in the business world.

A ‘360-degree review’ (or ‘360 assessment’) in an employment setting allows feedback from a set of questions about the person being reviewed involving four sets of people:

- **their manager** and perhaps others in the chain ‘above’ the one being reviewed;
- **direct reports** (jargon term!) – those who report to the person being reviewed;
- **colleagues, team members** or other peers the person works alongside;
- **clients or customers** outside the organisation but to whom the person relates.

The one being reviewed undertakes self-appraisal using the same questions or headings as those in the four groups.

Most 360 schemes include two or three people in each of the four groupings. The one being reviewed usually chooses who these are to be, being advised to select 'critical friends' rather than their fan club.

It is typically (but not exclusively) used for senior staff with the emphasis on different aspects of leadership, being seen as a leadership development tool. It requires careful planning in advance. An independent enabler, who then shares the results with the one being reviewed, needs to be sensitive and skilled in feedback techniques, offering support as necessary.

The review can be carried out in a descriptive way (with review questions in 'open ended' format), or scores can be given to a longer list of attributes or questions so the results can be analysed by specialist software.

What is noteworthy is how the four groups involved differ in their perception from the response to the questions by the one being reviewed. Those who answer the questions are usually promised anonymity and all the feedbacks to each question are collated together rather than seen as separate responses from each person.

There are a number of possible variations. If those giving feedback consist only of the manager, colleagues and oneself, this is known as a '180-degree review' (because it only covers half the full circle if you picture it in that kind of way). '360' is often seen as an *additional* review method to normal line manager interview rather than a replacement.

2 **Pluses and minuses**

Advantages over manager interview

- It offers competency feedback on skills, performance and relationships from a much broader group of people than just one manager whose views may be biased or who may not often see the person being reviewed at work.
- Each group may perceive the one being reviewed in different ways (eg. customers may have a higher opinion than colleagues) to give a more holistic picture. The scheme should affirm but it can also reveal weaknesses.
- It is a more thorough system than that offered by an unskilled manager with a 'tick box' appraisal form and its anonymity enables greater honesty.
- It offers a sound choice of professional development needs including training.
- It gives the person's line manager a reasonably objective overview which may lead to a change in their perception of the employee. In a team setting it can show up group strengths and weaknesses which the manager had not appreciated before.

Potential problems

- Its value depends to a large extent on the review questions chosen – and who makes this choice can therefore bring in an element of bias.
- If the one being reviewed selects those who answer the questions (within given categories), they may choose those who have a high view of them.

- It can get quite complicated, and the software designed to cope with this can seem less personal than a non-scoring approach (schemes can have 50+ areas to score).
- It depends on everyone being honest but fair, and this may not be the case with a few. It can be quite brutal unless managed with care by a sympathetic and skilled enabler, especially necessary if such reviews have never been carried out before. Peer group appraisal can be especially tricky.
- It can fall flat if there is not already wise, firm line management in place; effective follow-up is essential.

Having said all that, most large companies now use this method of review and feel it has clear advantages over the default of manager interview alone.

3 **Is this appropriate for church use?**

This is a question that needs to be asked for any tool from the secular world. Churches are, first of all, voluntary organisations where most 'workers' are not paid and so not in an employment setting. Even Ministers (in Anglican churches) are not employees but office holders. But, secondly, churches are gatherings of Christian disciples living under the value system of the Kingdom of God. They will have different ideas about leadership competency from what would be seen as normal in the secular world.

But the basic idea seems thoroughly appropriate for a church as it is all about development, honesty, vulnerability, and being the best that we can be in Christ's service. For an example to justify review itself, read Revelation chapters 2 & 3!

The enabler should be as independent of those involved as possible. They need to be robust in their analysis if weaknesses need to be addressed but sensitive in the way they work with the one being reviewed. They need to be astute in their judgement of people's views (which may say as much about the reviewer in some cases as about the reviewee) and diligent in their follow-up. If nothing changes as a result of this exercise there will be a real feeling of let-down when expectations are running high.

Other dangers in applying 360 review to churches

- Lack of competency in planning a scheme (such as in setting the questions, choosing suitable reviewers, understanding HR).
- Lack of competence in the final review interview, if undertaken by well-meaning but inexperienced church leaders.
- Copying questions and understanding from the secular world without reconsidering what church leadership is all about.
- Lack of honesty from Christians who have never been asked to review another person's competencies before, either being wary of judging others or being eager for attack.
- Leaving a leader devastated by what they have heard people think of them when they are seeking to be the best they can be against seemingly impossible odds.

These are the dangers to be overcome when designing '360' in a church setting.

How to explain the system to reviewers

Include the following points

- How 360 review works (some may be familiar with it from employment, some may not have come across it before).
- What the aims are.
- Confidentiality is assured.
- Pray for this whole process and (date/time) for the enabler meeting the one reviewed.
- Base your assessment on the person's role.

Instructions for their replies

- Be encouraging and fair but honest.
- Avoid vague generalisations and seek to offer actual examples to illustrate what you say.
- Keep your comments as brief as you can without compromising what you want to say.
- Focus on seeking to help the person grow rather than offering personal criticism.

4 Application to Ministers

360 review, or at least 180 review, is already being practised centrally in some Church of England dioceses in their Ministerial Development Review scheme (MDR), in some form in the Methodist Church and other denominations too. This means there can be official HR experience and skill on offer through specialist staff (or bought in) and a system in regular use with a team of trained enablers rather than a one-off in an individual church.

Groups to select from

Appraisal groups will not exactly match those in a secular management setting. But consider:

Managers: Many Ministers have no manager as such. Consider diocesan Senior Staff (and denominational equivalents), Ministry Heads or senior Trustees (Church Wardens).

Direct reports: Church members.

Colleagues: Members of the church Ministry Team or PCC. Why not include the reviewee's spouse (if relevant)?

External clients: Local clergy, Head Teacher of church school, community leaders, any close friend who makes no Christian profession.

Suggested question-types for changes

- What three or four features do you particularly thank God for in this person's leadership and ministry?
- Which of their gifts do you personally especially value? Be specific as to how each impacts your life.

- What two or three suggestions for change in this person's ministry might you offer to develop or correct what you feel could be improved? Consider teaching, pastoral, evangelistic, organisation and other appropriate areas for their work. In each case explain why you have chosen this change.
- What two or three suggestions for change in their style of leadership might you offer to help them grow as a Christian leader and disciple? Consider any of personal spirituality, humility, vision, communication, teamwork, vulnerability, balanced life, leading by example, other features of Christian leadership. In each case explain why you have chosen this change.

If you want something simpler try:

- 1 What does this person need to do more of to be more effective?
- 2 What does this person need to do less of to be more effective?
- 3 What does this person need to start doing to be more effective?

You might ask the same questions of both their 'leadership' and their 'ministry'.

Suggested question-types for scoring

In each case offer a scoring from 0 (serious problem here) to 10 (does brilliantly)

- How well do they maintain a healthy work/life balance and look after themselves and their family?
- How well do you feel they maintain their Christian discipleship?
- How good are they at encouraging and helping others to grow as disciples?
- How healthy are their relationships across a broad mix of church members?
- How healthy are their relationships with those with little Christian connection?
- How good are they at handling difficult pastoral and other issues?

An alternative would be to use each of the ten numbered points in the Ordinal based Training Notes TN78, *The role of a church leader*.

Or you might take the list for elders in Titus 1:6-9 or I Timothy 3:1-13.

The enabler feeds back themes to the Minister who then might choose two of his or her reviewers as an accountability group for the next six months to ensure appropriate action is taken.

5 **Application to church staff and voluntary leaders**

There is no reason why a church staff team should not utilise a 360 review. It could also work for home group leaders, children's and young people's leaders, ministry leads. But go carefully here: the idea of reviewing volunteers is somewhat controversial.

If you try staff or volunteer leaders, here are some suggestions to avoid obvious pitfalls. One issue will be finding reviewers who can see the person concerned in operation.

- Aim to overcome each of the list of dangers above.

- Ensure you have an experienced and skilled enabler to run the scheme for you. This might be an HR professional or trained counsellor within the congregation with knowledge of 360 review or you might know a Christian outside your church membership who would be willing to do this for you.
- Keep it very, very simple. Avoid scoring systems and you might use only three or four questions for each person to review on and no more than six reviewers.
- You need each staff member to suggest those to review them within given categories but this list should be open to discussion with the Minister or enabler in case they can detect bias.

These notes are available at <https://www.john-truscott.co.uk/Resources/Training-Notes-index> then TN144. See also Article A32, *Be creative as a line manager*, plus Training Notes TN17, *Suggested questions for an annual review*, TN78, *The role of a church leader*, TN87, *What to look for in your leaders*, TN132, *What you look for in your Minister*, and TN157, *The value of reviewing the past*.

John's resources are marked for filing categories of Leadership, Management, Structures, Planning, Communication and Administration. File TN144 under Management with a link to Leadership.

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