

2016 Ministerial Evaluation, Rev. Nancy Palmer Jones

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Evaluation Team, Purpose and Methodology

Evaluation Team:

Robert Strong, President

Bill Shepard, Treasurer

Kristin Rivers, Director

Frank Bosche, Director

Nancy Coleman, Former Secretary

Marnie Singer, Secretary

Bruce Halen, Director

Susan Miller, Director

Madeline Morrow, Former President

Purpose:

The purpose of Ministerial Evaluation is to strengthen and focus the capacities and relationships of our Church and our Senior Minister to fulfill the Mission of this Church, to "Make Love Visible in All that We Say and Do".

Methodology:

The Board appointed an Evaluation Team consisting of the elected Board members and the former President and Secretary. Using the Board's written Ministerial Evaluation Process, forty congregants were interviewed using the specified interview questions, concerning the work of the First Unitarian Church of San Jose's Senior Minister, Rev. Nancy Palmer Jones. The Evaluation Committee then answered the evaluation questions, and consolidated those into this report. Responses were interpreted using the Letter of Agreement between the Minister and congregation dated June 1, 2012, as well as the other documents specified in the Ministerial Evaluation Process.

The Rev. Nancy Palmer Jones was provided with the "anonymized" congregational interviews, and answered the same set of evaluation questions in her self-assessment.

The Evaluation Team and Rev. Nancy Palmer Jones then met, discussed, and produced this consolidated report, "2016 Ministerial Evaluation, Rev. Nancy Palmer Jones".

Summary

From the Evaluation Team:

The Rev. Nancy Palmer Jones' goals, actions, voice and energies continue to be an excellent fit for the Mission, Vision and Ends of the First Unitarian Church of San Jose. We, the Evaluation Team, see in her a leader and voice for our Church for this time and into the foreseeable future.

The Evaluation Team believes the challenges for our future can be well-met by the congregation continuing to build its lay leadership and coordination, and by continuing to strive to "Make Love Visible in All We Do and Say".

Our desire is that as the congregation builds its lay leadership and coordination, our senior minister may focus more fully upon hearing her call, upon communicating it to and through our Church, and upon guiding us toward becoming an embodiment of the "Beloved Community".

From Rev. Nancy Palmer Jones:

The First Unitarian Church of San Jose and I remain a good match! The similarities between my responses to the ministerial evaluation questions and congregants' feedback are remarkable and reassuring. My strengths and areas for growth are listed below.

Key needs: We need to get a Congregant-Engagement (used to be called "membership") system in place. And I need to strengthen my practices for self-care on a daily, weekly, monthly, seasonal basis.

Self-assessment by Rev. Nancy Palmer Jones

Ministerial Evaluation: Senior Minister Self-Evaluation
Rev. Nancy Palmer Jones
First Unitarian Church of San José
August 18, 2016

Summary

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Key needs: We need to get a Congregant-Engagement (used to be called "membership") system in place. And I need to strengthen my practices for self-care on a daily, weekly, monthly, seasonal basis.

Content of This Self-Evaluation:

- The **Introduction** describes the scope of the Senior Minister's role and then lists key sources by which my work can be measured:
 1. The expectations listed in my Letter of Agreement
 2. Our Vision 2015 (this evaluation period covers the last two congregational years)
 3. My own goals for my ministry
- **My Responses to the Ministerial Evaluation Questions:** I wrote my self-assessments. Then I read through congregants' feedback and offered further reflections based on what I see in that feedback.

Introduction: What Is This Senior Minister Called to Be and to Do?

A Personal Perspective — or, What I Have Learned Since My First Sabbatical

In the December 10, 2010, sermon, right before my first sabbatical, I riff on the role of the congregational minister — especially the Senior Minister in a midsized congregation. My primary goal at the time is to provide some context for why ministerial sabbaticals (and other breaks) are a good thing, but I'm also trying to capture, for myself and for you, the "size of the cloth." Here is how I put it then:

We congregational ministers are called to be — or perhaps I should say, we're often *expected* to be — preachers and teachers, spiritual guides and pastoral caregivers. That's the most obvious layer. But we must also be (especially in a church this size) both leaders *and* managers; visionaries *and* administrators; public spokespeople, community organizers, and interfaith partners; philosophers, scholars, storytellers, poets, *and* practical organizers — a list requiring a range of gifts and skills that no one person can seriously embody. More than anything, though, we are called to be, and *honored* to be, witnesses to the lives of the people and the community we serve, companions on our spiritual journeys, co-authors of the next chapters in the long and wonderful congregational story that is now in our trust.

In short, ministry is a 24/7 job, despite our combined best efforts to bring it down to 24/6. It wakes us ministers up at night; it occupies 90-95% of our waking thoughts; it both lifts and burdens our hearts; it stretches us to be better people than we could have imagined being. It is challenging, exhausting, *very* difficult for our friends and families — and it is filled on a daily basis with unexpected grace and beauty. I love it. I am grateful for it.

Today as I read these paragraphs, I marvel at the big-picture view that I was able to nab so early in my ministry and at that especially tender and exhausted moment. (It's poignant now to read the part about how hard ministry is on friends and family, given what was about to happen in my own family life — that is, the final dissolution of my marriage.)

I also feel a thrill of gratitude for how much more I have learned in the years since I wrote those words. For instance:

- I came back from that sabbatical determined to “lead from my strengths” — to worry less about which of those many skills I couldn't do so well and to appreciate the abundance of skills I do bring. I wanted to feel that “I am enough” so that I could stop “leaking energy” by fretting about the high standards (often self-imposed) that I am not achieving in some areas. This is a lifelong learning curve, involving the undoing of ancient habits. I love my commitment to this learning; I love the resources I keep uncovering to help me make these changes; and I love how we support each other in our mutual evolution!
- Giving myself permission to lead from my strengths has actually allowed me to grow in unexpected areas where I haven't felt so strong. *There's* a life lesson: when we let go and relax, we have a greater capacity to learn and grow. Stewardship is one of my prime examples.
- In many ways, my main task as a minister is to “live life out loud,” striving to model with my own being the core of our Unitarian Universalist faith and the essence of our First Unitarian mission: to Make Love Visible in all that we do and say. Sharing my human failings and limitations, as well as humdrum life challenges and my shining moments, becomes a means for us to grow together. To this end, I have moved in the direction of ever greater transparency and authenticity in my ministries. This has pluses (a sense of intimacy and ultimacy in our relationships, which are prime goals in religious community) and minuses, since the boundaries between the personal and the professional can blur even more than they already do in this vocation. It is a fascinating dance!
- Every minister has her own personal call to ministry that underlies, or adds on to, the call that she fulfills professionally. During a Social Hour in the year before my first sabbatical, then-Program Officer Tamara Payne-Alex asks me about my personal sense of call. It is a transformative moment, giving me permission to honor my holy discernment of what I am here on earth to do and suggesting that I might stop trying to be all things for all people. Deep in my soul I know that working for and modeling healing around the deep wounds that racism in this country inflicts on us all — thus, working for antiracism and an end to white supremacy — lie at the heart of my personal call to ministry. Sharing this ministry with our congregation, sharing it with our local community, and sharing it with our religion — as well as constantly calling myself to learn and grow in these areas — are the means by which I fulfill this personal call.
- A healthy ministry evolves with the minister's own personal and professional growth, with the needs of the congregation, and with our rapidly changing societal and global landscapes. The focus of my ministry at FUCSJ changes from season to season in an overarching sense, and from week to week on the granular level. The demands of this global moment — of the hyper-connected 21st century, of untenable inequities in our society, of climate disruption and destruction, and of ever-changing styles and needs for spiritual/religious community — call us to new ways of ministering and of “doing church.” I am determined to grow, and to help us grow, with our times!

The Institutional Perspective on the Senior Minister's Areas of Ministry, and the Minister's Goals

From the Senior Minister's Letter of Agreement

- Shared leadership on: spiritual leadership and initiative; setting congregational vision; performance and oversight of congregational programs
- Pulpit and worship services
- Pastoral care
- Rites of passage (weddings, memorial services)
- Services to the Board, Program and Operations Council, and other committees
- Development and implementation of plan for Membership Growth
- Community activities
- Relationship to church staff
- District and denominational service

Vision 2015

We seek to build a religious community that makes Love visible in word and deed. Therefore we are called to:

- Create a caring, connected congregation that actively reflects the richness and diversity of our community, honoring and nurturing with justice and compassion all that makes each of us unique.
- Undertake bold initiatives to transform ourselves and our community.
- Worship together so that we connect with the divine, transcending the boundaries that limit us, to become part of something greater than ourselves.
- Care for, nurture, and empower the growth of our children and youth through vibrant and engaging lifelong faith development and social programs.

Specific Senior Minister Goals for the Past Two Years

1. **Help the congregation to become truly Mission Driven;** for example, by:
 - a. Lifting up our “brand” (the short version of our mission: to “Make Love visible in all that we say and do”) at every opportunity, especially in worship, in writing, and at public gatherings — using the explicit language but also shaping the content of my messages around this mission
 - b. Ensuring that others in our congregation have learned this mission by heart (asking “what is it again?” in worship and other gatherings) and that we (personally and corporately) are considering its meaning
 - c. Weaving the monthly themes throughout our church life, especially by working with the Small-Group Ministry Content Team
2. **Deepen our spiritual life by encouraging us to “live broken-openhearted”** — meaning that (a) we allow our hearts to break open by facing directly into the pain in our world/nation/city/congregation/families and that (b) we then transform this heartbreak into a greater capacity for compassion, connection, and aliveness
3. **Strengthen my practices of self-care**
4. **Increase the practical ways in which we share the ministries of the congregation** (also applies to self-care); for example:
 - a. Increasing the role of the Pastoral Associates, deepening our partnership and broadening our reach in pastoral care
 - b. Encouraging FUCSJ folks to take more leadership in the public ministries of the church, such as through PACT and the Beloved Community Movement

- c. Finding a better balance in my visible and audible presence in our governance teams; stepping back so that our lay leaders can step up
5. **Represent Unitarian Universalism and FUCSJ and make a difference in our city and county through engagement with public ministries** such as PACT and the Beloved Community Movement
 6. **Work with our Stewardship team to shift our Stewardship model** to a lively, ambitious, thorough, FUN, and transparent one by participating in all aspects of the Annual Stewardship Drive
 7. **Help get something and/or someones in place to offer Membership Engagement Coordination**
 8. **Supervise and support our Field Education Student** (Nikira Hernandez, 2014-15) **and our Sabbatical Religious Educator** during Rev. Geoff's sabbatical (Emily Carroll, Winter-Spring 2015) — and bring two-year part-time intern Rodney Lemery on board for 2016-18
 9. **Help launch and support FUCSJ's 150th Anniversary Celebrations**
 10. **Serve our larger Unitarian Universalist movement** through researching and co-writing *The Joy of the Journey: Unitarian Universalist Congregations on the Road to Multiculturalism* (Jones and Lin; working title; Skinner House, forthcoming, 2017)

Ministerial Evaluation Questions and Responses

1. *Is there a good balance among all professional responsibilities? Is the Minister doing self-care and taking contracted time off?*

Balance among professional responsibilities:

Given the scope of the Senior Minister's role, the evolution of these ministries, and the seasonal aspects of my focus, I feel that **over the course of this evaluation period (the last two years) there is a very good balance among all my professional responsibilities.** The exception is important to explore:

- **Development and implementation of a plan for Membership Growth:**

Plainly put, I have not done this. Yet the issue is never far from my mind. *Context:* Understandings about “membership” have changed in this century. Overarching economic and social trends in this valley and nationally have created more stress for everyone in terms of their time and financial resources, which mitigates against membership. In addition, millennials and younger generations are known not to be “joiners.” In general, they want looser, more action-oriented affiliations. Congregations are working hard to understand what these changes mean for our traditional approaches to membership, stewardship, and more, with some best practices already emerging and much more to learn. The traditional way of measuring congregational health — by numbers of new members joining each year — is being replaced by other measures of vitality: numbers impacted by congregational programs; the reach of these programs into the communities; the depth of satisfaction with one's spiritual/values-driven personal growth as a result of congregational affiliation; evidence that the congregation is growing “warmer, deeper, stronger,” no matter what its size; and more. **Adapting our congregational goals to match our 21st-century circumstances must be an explicit part of our shared ministries moving forward.** The old narratives will not work.

In summary: Ministry asks for more skills, gifts, and time than any one person realistically has. There will always be dropped balls and folks who feel that their issue/concern/life is not as important as it should be for the minister. Overall, ours is a very generous and understanding congregation — hooray! But learning to live with dropped balls is a spiritual practice for me and for all of us. In fact, my repetition of this point reveals my own struggle with my high expectations and drive for something closer to “perfection.” It's good to want to grow and do things better; it's a waste of time fretting about unrealistic expectations.

Discerning and naming which balls need to be kept in the air at any given time — and developing a practice of humility and groundedness that “we are, indeed, enough” and that Life Will Happen — need to be a focus of our shared ministries.

Self-care and contracted time off:

Self-care practices: My regular practices are varied, rich, and always evolving. They include:

- Walks
- Photography
- Harp
- Therapy
- Friends
- Variety in the locales where I work (office, home, coffee shops, libraries, friends’ homes)
- Flexibility in which hours are devoted to which aspects of ministry (sprints vs. marathons) and to self-care (the chance to be spontaneous and follow my instincts)
- Stepping away from the ministerial role in the evenings when I don’t have meetings. Not looking at email after a certain hour.

There is always more work for me to do in this area of self-care. See “I am enough”/“we are enough” above.

Study break and vacation days:

- Every congregational year (early August to early August, based on my original start date and the congregation’s program year), I take the full month each of study break and of vacation. Exceptions occur when an urgent congregational event curtails these breaks — such as the death of a member or a visit from or trip to our Partner Church.
- In the past two years, my work on *The Joy of the Journey* has almost completely taken place during these study-break and vacation weeks. This has a mixed impact on the recovery time offered by these “times away.”

One Sunday off a month:

- Almost always successful in scheduling these, in consultation with Rev. Geoff and the Worship Associates Co-Coordinator

At least one full day off each week:

- Rarely happens
- I usually take a half day on Mondays and at least a half day on Fridays — but that’s not equivalent to one full Sabbath day.

I need to work on this.

One day a week for study and writing time:

- Hahaha and hohoho! I mean, *come on*: although one “writing day” is still considered standard, it’s actually laughable in terms of preparing really good worship services *and* in terms of eliminating a full day’s worth of meetings each week. Instead, worship preparation spreads out over the weeks and sometimes months preceding a service. It involves multiple participants and meetings, as well as a variety of styles of research and openness to input. Not all worship services receive the same amount of time and research, depending on what else is happening in congregational life. All require a final push that consumes much of the final two days of each week when I am leading worship.
- Still, worship preparation has gotten much easier, more streamlined, and less stressful with the development of the dynamic and talented Worship Associates and Music Ministries teams and with my increasing years of experience.

2. *Does the time spent on different areas of ministry generally match the priorities expressed in the congregational and ministerial Ends/goals and Vision statements?*

- Overall, yes.
- Specific examples, organized by elements of **Vision 2015**:
 1. Create a caring, connected, diverse congregation with justice, compassion, and an emphasis on developing our capacities for multiculturalism, antiracism, and antioppression
 - a. Increasing and deepening the capacity of **Pastoral Associates and Caring Hands** — monthly meetings with Pastoral Associates to track our care for members and friends and to build lay members' pastoral skills; new members added to the Pastoral Associates team; Pastoral Associates have cleaned up the Caring Hands list and offered a lunch gathering for current and potential Caring Hands
 - b. Providing **my own in-depth pastoral presence** to affected individuals and to the congregation in times of crisis and trauma — for example, during the last three months of extraordinary loss in our community
 - c. Working with the **SGM Content Team** to integrate our monthly transformational themes into this ministry; working with **SGM Coordinator** to increase participation in SGM through Open Enrollment months and more regular support of leaders
 - d. Bringing in a **seminarian of color** (Nikira Hernandez) to add more diversity to our worship leadership team and to reestablish the congregation's role as a teaching community
 - e. Co-leading "**Beloved Conversations**" and helping to bring this curriculum to many congregations throughout our district
 2. Undertake bold initiatives
 - a. Co-leading from its beginnings **PACT's Beloved Community Movement** to radically reshape relationships among law enforcement, elected officials, community members, and faith leaders; ensuring that I share this leadership and engagement with members of the First Unitarian community. FUCSJ now has at least 3 consistent lay members of the Beloved Community Leadership Team (which meets at least once a month), and many more who show up for community dialogues and for meetings with elected officials. This participation ensures that lay members and I are sharing the power of this ministry; are bringing the face of Unitarian Universalism to the public square; are experiencing our agency for social change; and are developing and putting into practice our multicultural, antiracism competencies.
 - b. Working with a wonderful and expanding congregational team to transform our **Stewardship** practices and increase our annual pledge base
 3. Oversee and offer transcendent, transformative worship
 - a. Deepening the messages and cohesion of our **worship services** by encouraging us to "live broken-openhearted" — facing directly into the pain in our world/nation/city/congregation/families and transforming this heartbreak into a greater capacity for compassion, connection, and aliveness
 - b. Expanding the **Worship Associates** team to represent a wider diversity of our congregation and to lift up voices we don't usually hear; as always, working with the **Worship Associate Co-Coordinators** to develop the skills and spiritual depth of all who participate in worship
 - c. Working with a team to bring **Choir Director John Ector** to FUCSJ; ensuring that he participates in the annual Unitarian Universalist Musicians' Network Conference (bringing home varied repertoire, best practices, and theological grounding for our Music Ministries); and giving my time to sing with the choir. On Jazz Sunday 2016, the choir was 19 members strong!
 4. Nurture and support our youth

- a. Working with Rev. Geoff, our youth leadership, our parents, Youth Advisors, and other district ministers to navigate the transition from one youth organization (YRUU) to a new 501.c3, **YRUUP** (Young Religious Unitarian Universalists of the Pacific); attending part of one of the YRUUP cons (conferences)
- b. Attending the **adoption ceremony** with Rev. Geoff and other congregants of the Delacey family
- c. Participating in one activity each year with our annual **Peace Camp**
- d. Building my own **relationships with our children and youth** through offering Stories for All Ages and connecting with them on Sundays and at other multigenerational congregational gatherings, such as the **Church Campout 2015**

3. *Based upon the Letter of Agreement and the Responses, what are the areas of strength or effectiveness of the Minister?*

Plus: the first question in # 11: What are the strengths of this minister within the “interconnected web” of the church?

Self-assessment of my strengths:

- **One-to-one relationships:** In one-on-one or two-and-one meetings — whether in the form of pastoral care, worship creation, staff and lay leadership coaching and coordination, or in the form of simple greetings and conversations — I almost always communicate my full presence, compassion, and love.
- **Team building:** Working with the staff, with congregational leaders, and with the groups that epitomize our shared-ministry model (such as Worship Associates, Pastoral Associates, SGM Leaders, Board, POC), I usually bring encouragement, affirmation, vision, joy, and laughter; at other times, I bring my vulnerabilities and brokennesses in authentic if sometimes awkward ways — i.e., “being human out loud.” I model ways of being and working together that are healthy and sustainable.
- **Worship leadership skills:** In addition to the presentation, writing, and storytelling skills I bring from my previous vocations, I work well with partners to create worship that touches the heart without ignoring the head and that holds together from beginning to end. I have developed the capacity to preach well from notes as well as from manuscript. I have studied and continue to implement 21st-century styles of preaching and worship leadership. I have grown into acceptance that we can’t hit it out of the park in worship every week — but that every week, someone(s) will get something they need from the worship we offer. And I am increasingly bringing a worshipful tone to other locations of our ministries (meetings, public square, etc.).
- **Visioning:** I promote and strive to model “Making Love Visible in all that I say and do.” I bring commitment, resources, articulation, experience, compassion, and a sense of next steps to our vision of creating multicultural, multigenerational, anti-oppressive Beloved Community. I encourage our mutual education around 21st-century visions for Unitarian Universalism.
- **Public ministries:** Through the commitment of my time, energies, intellect, and relationship-building skills, I have created (once again) an effective and shared place at the table for First Unitarian in our wider community, increasing our visibility and our lived expression of our faith. I conduct an online Facebook (FB) ministry that reaches some 1500 people around the world. In addition to messages and comments on FB, I get direct feedback from folks in our congregation and others at General Assembly about how much this ministry means to them.
- **Denominational leadership:** Part of the call for all Unitarian Universalist ministers is to contribute to our wider faith through national, district, and collegial service. I attend ministerial retreats and educational workshops, have held leadership roles and offered classes, and now the book project (which I was invited to do) represents a primary contribution to our faith.

My reflections on Congregants' Responses about my gifts and strengths:

- Respondents appreciate some of the same skills I have listed (hooray): my **1:1 relationship and team-building skills, my pastoral care, and (in general) my worship leadership**. The vast majority want my **public ministries** and the **focus on multiculturalism and antiracism** within our congregation to continue to grow.
- Quite a few name **intelligence, energy, courage, caring, collaboration, positivity, inclusivity, insights into human nature, leadership development (in 1:1s and some groups), speaking and writing skills, and deep commitment to the congregation** as key attributes. Nice!
- The overall impression is that the congregation feels we have a lot of gifts to work with in our relationships with each other.

4. *Similarly, what are the areas of desired growth or concern for this Minister?**And # 9: On which responsibilities named in the Letter is this Minister least effective and how?*Self-assessment:

- **Self-care, self-care, self-care, self-care, self-care:** This includes saying “no” more often so that I can sustain my energies and be more responsive to those commitments I make; deepening my spiritual practice of understanding that “I am enough”; getting more exercise; integrating into my schedule a growing self-awareness and self-acceptance about my evolving energies and biorhythms as I change with the years ...
- **Regularity of communication**, especially in terms of **reporting** to leadership and congregation (see question 7 below for amplification), but also in terms of **managing and responding to email** (which comes in an overwhelming flood, and which I mostly hate). Although I have trained congregants not to rely on email with me and not to expect rapid responses, I know this must be a thorn in the side of many. And although I sometimes achieve a degree of acceptance about the utter hopelessness of staying on top of the communication needs of this job, at other times it gnaws at me. Perhaps some type of coaching would help alleviate the stress arising from this dark hole? And saying “no” more often, risking the disappointment and displeasure of those who get that “no”
- **Worship:** My desire to grow in my worship-creation and worship-leadership skills is infinite. I am grateful for my growth so far, but I will never be fully satisfied. As a community, we must also expand our “worship vocabulary” (styles, rhythms, music, media, locations, times) to meet 21st-century needs.
- **Discerning the balance in the use of my leadership and power:** As my own skills grow yet our need for more shared ministry also increases, I need better habits of knowing when to step back, and when to step forward — but mostly when to step back.

My reflections on Congregants' Responses about my areas for growth:

- Almost everyone agrees that I need to focus on **increasing my self-care, on delegating, and on choosing where I put my energies very carefully. Yes!** People appropriately worry about burnout and overwhelm, and I do too. Some moments of overwhelm, though, are *inevitable* in this work, because the issues we deal with are so varied and are often both unexpected and very serious. I am already working on shifts in my practices (through therapy, professional growth, and on the job), but I will also spend time on sabbatical developing good practices that I can put in place here and that we can share that will help. **This is my main goal for the next chapter of our ministries together.**
- Related: several folks mention my **tendencies to over-control** in some situations and, conversely, to **neglect attention to detail in others** (see the former Office Manager's comments about my **organizational skills**). I wish there were more staff support; the Office Manager's tasks already fill the hours she has, and we currently can't afford more staff. But let's look for creative ways to share some of the details of my job.

- I appreciate those who lift up **my tendency to blurt or snap when I am particularly weary or stressed**. I am very sorry for any pain I have caused (and always apologize immediately)—and I am *imperfect!* I am working hard on therapeutic and spiritual practices that help me get out ahead of these impulsive and nonproductive responses: (a) preparing myself ahead of time for meetings and other encounters that take place when I am not in optimal physical and emotional shape and/or situations that might be triggering; and (b) in the moment, practicing slowing down, noticing rising emotions, and breathing before responding. I already see some progress, but let's see what further transformations can occur!
- Several people ask for **more tightly led and shorter worship services. Yes!**
- A few people ask for a **different style of sermon, especially with more theology, history, outside sources explicitly woven into them**. Perhaps with the restructuring/reassigning of the more detailed aspects of my job, and by scheduling fewer personal meetings, I could make time for the kind of research/input that I too enjoy integrating (and that I do integrate sometimes). But we will not go back to the heavily intellectual sermons of our religion's past. (And I would note that I get equal amounts of praise for the most personal of my sermons. Whadda UU gonna do? Yes, I probably sound defensive here — preaching is such a tender and awesome responsibility to hold!)
- The Responses indicate a variety of feelings about **my involvement in the book project**: some are excited about its impact on our congregation and our movement, and are eager to hear more; some feel that it should not take time from my congregational duties. We need better communication about this project and its role in my ministries, and I have not the way about this communication — too busy trying to keep up with all the immediate demands! To the Evaluation Team: Let's talk about this in person and make a plan.
- Several respondents ask for more leadership from me in **connecting with and inviting our youth to participate in all aspects of congregational life**. I would love to do this. Can we come up with realistic practices to connect *all* of us more with our youth?

5. **Does the Letter match the current reality?**

(Comments in this section have been incorporated into the “Opportunities and Needs of the Church”.)

No. For example:

- **Committee on Ministry:** We no longer have a functioning Committee on Ministry. Our most recent versions have been noble experiments, to which Frank Bosche notably (along many others) contributed with heart, but we never established a clear, useful, and sustainable mission for the group. In terms of ministerial support, the Pastoral Associates team acts as my best congregational resource. And Rev. Geoff provides invaluable ministerial support, wisdom, and partnership for my work.
- **“Community Activities”:** Although I understand the desire to express this ministerial area in an open and flexible way, for me the phrase *community activities* is too timid and watered down to capture the “fire of commitment” of our faith. It does not express the urgency of our call to be in real relationship with our neighbors and kin beyond our walls, acting in solidarity for much-needed social change. “Public ministries” is a little better.
- **Not explicitly mentioned:**
 - **Social justice ministries** both *within* and *beyond* the congregation — that is, my role as ministerial partner in our personal and congregational development as the Beloved Community, as well as in our work for building Beloved Community in our wider world. I am called to do these things, and I am doing them, but they don't show up in the Letter.
 - **Relationship building within and beyond the congregation:** Relationships lie at the root of all my work and of all our work as a faith institution. Within the congregation, my capacity to

build relationships with individuals, groups, and the congregation as a whole influences the levels of warmth, cohesion, and trust in our community. These are the essential elements for our walking through life together (i.e., for our *being*) as well as for our capacity to *do anything* effectively. Beyond the congregation, building relationships is the means by which I make Love visible. **In our relationships lies our power for transformation and influence based on our religious values.**

6. ***Are the Minister's own Goals in alignment with the Mission and Vision and Ends, and with Congregational Goals?***

I believe so, and I always strive to make them so. I look forward to our comparing notes in this evaluation process and to growing wiser and more focused in our choices.

7. ***Consider the Minister's relationships with the Board and with the Congregation. How are the quality and thoroughness of the communication in each direction?***

About the quality and thoroughness of my own communication:

- **Strengths:** my capacity to convey thought, emotion, authenticity, warmth, compassion, and ministerial presence in a variety of modalities — spoken, written, sung; in person, via email, on social media; etc.
- **Not-so-simple-gifts:** “’Tis a Gift to Be Simple” is a beautiful song and a profound spiritual practice. But *my* gift is to offer complexity, nuance, and a conversational, deeply personal, and even idiosyncratic style in my communications. These communications — essays, reports, emails, stories — take time and thought. And they are rarely short. It takes *more* time to write (or even speak) short than it does to write (or speak) long. These gifts have pluses and minuses; like my theology, it’s always both/and. I am going to let go of “perfection” in this area (which might constitute short, pithy, warm, AND nuanced communications) — and maybe we’ll actually see some growth here when I do!
- **Areas of growth and concern:** See “regularity of communication” under # 4.
Plus this riff on my reporting: During my time with FUCSJ, I have sometimes been explicit in *writing down* my goals, priorities, and accomplishments and then *sharing them with leadership*. But I tend to be so occupied in the *doing* of our many ministries that my *recording* of and *reporting* on those ministries for leadership (other than in spoken reports at meetings) falls behind. Especially in recent years, I *speak* those goals and my progress to you or Rev. Geoff; I *allude* to them in newsletter essays; I *give voice* to them through repeated themes and phrases offered in worship and at other gatherings; and I *write* them in my own journal and *work* on them in therapy. **One of my new goals is a better discipline about communicating these very goals and the progress I make toward them.** I look forward to our defining the methods of reporting that will serve us all and to setting realistic expectations moving forward.

About the quality and thoroughness of the communication from Board and Congregation to Senior Minister:

- My own assessment: overall, the communication flow from leadership and congregation to me is very good. We have trust and (in general, though not always) access. Let me see if there are surprises in the Responses ...
- After reading Congregants’ Responses: Nope. I may not agree with each respondent’s comments or interpretations, but I don’t find surprises here. That’s great!

8. *Evaluate progress made since the prior evaluation. Has the Minister made progress in areas previously identified as areas for growth or of concern?*

NOT APPLICABLE in this evaluation, as it is the first using the new process

9. *Included with # 4 above.*

10. *Does the Minister need additional support from the Board? From the Church? Does the Minister have sufficient resources for professional and spiritual growth?*

- We need to partner in **educating the congregation** — in affirming, non-anxious ways — **about the real scope of my role and about the need for making choices about my priorities**. We need to set good expectations about my need to say “no” more often and about the turnaround time in my responsiveness.
- I am very good about referring folks (both within and beyond the congregation) to others when their questions or needs fall outside my primary areas — for instance, when someone calls me about space usage at our church (usually goes to the Office Manager, whom I can then support as needed in her decisionmaking process); when someone wants to offer a new educational program (usually goes to our Associate Minister for Lifespan Faith Development, with whom I can confer about the congregation’s spiritual-growth/life-skills needs and about realistic time management). But **I wish I weren’t so often the point person on just about everything**. There may not be an easy solution for this in a congregation our size, given my Senior Minister title and our limited staff and volunteer time. But my upcoming sabbatical offers an excellent opportunity for the congregation and leadership intentionally to discover new ways to share these aspects of ministry and congregational management.
- For professional and spiritual growth, **I must prioritize more time for reflection**, which means less *doing* and more *being*!

11. *What are the opportunities and needs of the ministries of FUCSJ towards “Making Love Visible,” especially in the areas of responsibility of this Minister?*

(Response to this question is incorporated into the section “Opportunities and Needs of the Church”.)

From Congregants’ Responses:

- Provide more **mentoring of ministers-in-the-making**: welcome, Rodney!
- Put more **focus on homelessness issues**: I hear that the Homelessness Concerns has new wind beneath its wings. I also *urge* leadership to work with them and with our interfaith partners (who have already done this) to open our space as a rotating winter shelter in the coming season.
- **Restructure the liaison role for the Building Committee** so that it is once more integrated into our monthly operations team!
- Update the **look and feel of the website** — and/or figure out another way to keep our **online presence** vital, inviting, and impactful.
- Create **leadership-development and volunteer- intake systems** that reach more folks where they are in these busy and traumatic times.
- Offer **direct-service opportunities**! (Julian Street Inn; Habitat for Humanity — but you can get creative about the possibilities.)

Personal assessment:

Healthy congregational life is in constant flux. We need specific goals and priorities to make real progress toward our larger vision, as well as to keep up with our changing world. Yet we must also “expect the

unexpected” and **grow our patience, flexibility, self-forgiveness, and broken-openheartedness** when our progress toward our goals takes a detour or seems slow. More than anything else, **congregational ministry is a responsive dance.**

As we move forward from this moment of reflection, may we **focus our energies on these fundamental and interconnected spiritual disciplines:**

- **Developing the capacities to stay healthy and grounded in all seasons** so that we can respond with strength and Love to the **unexpected and extraordinary life crises that will arise** — in other words, on a daily and weekly basis, let’s not waste our valuable energies on the small stuff;
- **Evolving our emotional intelligence and zeroing in on the tangible resources we need** in order to live in this new era of ongoing traumas (trauma as the “new normal”) and rapid change — in other words, let us learn to be nimble and courageous in the face of so much uncertainty.

Benediction

“Let it be a dance we do.” I am profoundly grateful, honored, and joyful about serving as your dance partner!

With Love,

Rev. Nancy

Report of the Evaluation Team

Observed Strengths:

Rev. Nancy's ministerial goals are an excellent match to the FUCSJ Mission, the Global Ends, and Vision 2020 (as well as to Vision 2015, which was in effect during this evaluation period). The Mission, all six Global Ends, and six of the seven items in Vision 2020 are directly addressed by her goals.

Overall, the interviewed congregants had many strengths to share regarding the Minister. She's credited as excelling in the areas of pastoral care, worship design, sermon writing and delivering, and showing up both in people's homes in times of crisis and at meetings and fun events. She's described as being a great listener who demonstrates her compassion and inclusivity with each interaction. Congregants feel heard, understood, and accepted by Nancy. Her willingness to be vulnerable invites openness and vulnerability in her congregants.

The Minister's energy and commitment to the congregation were mentioned in over 90% of the responses. The general view of the respondents is that she's been effective to very effective as Senior Minister of the congregation. She is described as intelligent, a great communicator, having a good sense of humor, and an open, warm, and caring soul. Other words used to describe her were inspirational, charismatic, compassionate, empathetic and creative. Her positive outlook and approach, and social activism were frequently mentioned.

One of Nancy's major strengths is her focus on self-improvement: she's learning to step back and let others step up. Recognizing and acknowledging mistakes makes her more approachable, open, and available to congregants. "Nancy now shows that she can 'go with the flow' more without trying to create perfection." Rev. Nancy is open to hearing criticism or feedback and responds with grace and a willingness to change.

There seems to be a consensus that Rev. Nancy is a wonderful communicator when speaking and writing. Her writing is both poetic and meaningful. Her editing skills are seen and appreciated. Her writing and ability to bring seemingly disparate experiences and learnings together into services has been both spiritually inspiring and intellectually stimulating. The quality of Rev. Nancy's communication in all-church emails, the newsletter, and Facebook posts are all greatly appreciated. She regularly shares her sources of inspirations via online media, which is a wonderful point of contact she offers our congregants. She is dedicated to keeping in touch with the congregation and does a great job writing up activities and reporting to the congregation.

She also listens well and encourages input. Words that people used about her listening include compassionate, warm, respectful, open minded, empathy, powerful listener, receptive to different points of view. She connects well with people at all levels. In times of crisis, she's described as empathic, caring, respectful, and intuitive.

She models talking things through, which helps others to recognize that they have the power and the right to speak. She is not afraid of being confrontational in a good way, to challenge people's beliefs. With the Board, she gets her point across when it's important and yet steps back and lets the Board do its own work.

Rev. Nancy's time spent with Worship is the Global End most frequently mentioned. She helps guide Worship Associates to find a better way to make their points and pushes them to go deeper in what they will share. She helps them to find their own voices.

One of her most commonly-mentioned strengths was how she presents the face of the Church through her work on social justice issues such as Black Lives Matter, and her sensitivity to issues of inclusion and diversity. Many consider her participation in community social activism as a huge strength and major benefit to the church.

According to the interviews, the Global End area mentioned least often was Stewardship. Respondents may not be aware of the work that Rev. Nancy does with the Stewardship Committee, or perhaps few members of the Stewardship Committee were interviewed.

Concerns:

Self-care is critical for a minister's long-term effectiveness and health, and in fact many interview respondents urged her to "take care of herself." Over half of the respondents expressed concern over the Minister's self-care. It appears that the fear is that with the Minister's direct involvement in so many activities that she must not have enough time and energy for herself.

Many respondents noted that Rev. Nancy is very busy with church activities, that she may be over-committed. At the same time that the congregants appreciate her high-energy, positive approach, they're also concerned about preventing overwhelm and burnout. Multiple congregants suggested she more actively delegate to allow more time and energy for more balance and for refilling her well.

Occasionally, she can be difficult to reach; perhaps the Office Manager could help with this.

The Vision 2015 item least frequently mentioned in our interviews was "Care for, nurture, and empower the growth of our children and youth through vibrant and engaging lifelong faith development & social programs." Rev. Nancy is often very involved with the children during and in preparation for worship. The majority of leadership in this area is in the domain of Rev. Geoff Rimositis, and was not central to our interviews.

The letter of agreement calls for goal setting and monthly reports to the Board. These written reports are happening irregularly.

Relationship to Church Staff - was not evaluated.

Recommendations:

Given Rev. Nancy's drive and interest, and the desires of this congregation, we do not recommend reducing the engagement of our Church in our community. We instead **recommend that volunteer coordination, membership engagement, and leadership development be strengthened** by the lay leadership. Similarly, action to inform our congregation of current responsibilities across programs should be taken by lay leadership: improve visibility and access to our volunteer leadership. We must find ways to effectively share and communicate responsibility, so we may make space for the Rev. Nancy to more effectively envision, inspire, and lead while allowing her to nurture her soul.

Rev. Nancy does **take sabbatical time and vacation time**, but her days "off" are often interrupted. Rev. Nancy may benefit from improved time management and more delegation, leaving more room for lay participants to take ownership, and relinquishing control over details. Rev. Nancy is a magnifier of our congregational efforts; she doesn't need to do everything.

The Evaluation Committee **affirms the choice by the Rev. Nancy's to engage in a book project** concerning the strivings by UU congregations towards becoming more multicultural and multiracial. We see this as important work for both her personal development and for its potential good for the denomination. This work is performed during Rev. Nancy's personal and sabbatical time this year.

We recommend a sustainable but regular pattern of **documented communication** with the Board be considered. Perhaps this required communication can be simplified to cite other available communications, adding whatever additional notes are intended for the Board.

The **salary** of the senior Minister should be brought into better alignment with the UUA guidelines.

Submitted with Love & Respect,
in Fellowship & Service,
The Evaluation Team

Supplementary Report: **Opportunities and Needs of the Church**

This supplementary report emerges from the Ministerial Evaluation for Rev. Nancy Palmer Jones. To be grounded in the full congregation, the "evaluation team" conducted 40 interviews with congregants. During those interviews, concerns, hope, and aspirations for the church were expressed that are more broad than the ministry of Rev. Nancy. These have been collected here for consideration for further evaluation and action by the Church lay and ministerial leadership.

To support our ministers more effectively, the lay leadership and congregation should consider the following needs and opportunities of our Church identified during the evaluation process:

- We need more coordination and support for **development of leaders** and for **volunteerism**. This will enable both a shift of existing tasks to volunteers, and enable more to be done by more hands, and deepen connections among the community. Offer **direct-service opportunities!** (Julian Street Inn; Habitat for Humanity — but you can get creative about the possibilities.)
- Our **social justice efforts** are central to our identity as a congregation. These need to be sustained and strengthened, particularly in regard to **Beloved Community**, and to the **homeless**. Among other initiatives, our senior minister's **book project** supports these efforts and also develops our minister's capabilities. The Homelessness Concerns has new wind beneath its wings. Leadership needs to work with them and with our interfaith partners (who have already done this) to open our space as a rotating winter shelter in the coming season.
- More **awareness of volunteer responsibilities** by the congregation may allow a wider window to establish engagement, than just the senior minister. This may allow the senior minister **more time for self-care**, as we expand our emphasis on volunteerism.
- The newly formed Young Adult group is an exciting development in the **expansion or continued support of the youth programs** and of the **parents**, along with the recently formed family support group of younger ages. Both of these are positive steps toward supporting our membership. However, more support of teens and their parents will be critical as we move forward, deepening our connection and support of each other.
- **Membership engagement** is central to our vision of our church in 2020. We seek to develop **leadership-development and volunteer-intake systems** that reach more folks where they are in these busy and traumatic times, that engages everyone: first-time visitors, long-time members, friends, and the community.
- We need to renew our efforts at **clear and engaging communication**. Our newsletter is vibrant. We need to update the **look and feel of the website**, and keep our **online presence**

vital, inviting, and impactful. Perhaps our website can be better informed by/integrated with the newsletter. We also might consider how better to use our web presence to enable our congregants. We can help them find and engage with each other and our leadership with more sharing of what we are doing within our community and at large.

- We need to **structure the liaison role for the Building Committee** so that it is once more integrated into our monthly operations team.
- First Unitarian Church of San Jose needs to continue **mentoring of ministers-in-the-making**: Welcome, Rodney!

By having a strong identity in social justice, by having a strong and vibrant youth programs, by having active coordination and recruiting of volunteers, by having clear and vibrant and engaging communication, we will attract, engage and retain members, thus sustaining and fulfilling our vision: strengthening our beloved community.

Gleanings from the interviews:

Some threads were common among the interviews conducted by the Evaluation Team follow below. Please note that these were offered, not prompted as such; these are ideas, not votes:

- About half of respondents identified **development of leaders or volunteerism** as a priority. A few went so far as to suggest using staff to focus coordinating and sharing of responsibilities.
- A more than a third of respondents identified **continuing or expanding our social justice efforts** as a priority. Half of those explicitly called out increasing our ministry to the **homeless**.
- A more than a third of the respondents identified a concern that a minister doing as much as ours is for our Congregation, needs **more time for self-care**.
- A quarter of respondents mentioned the **book project**, half looking forward to reading it and half wondering whether it is a benefit for our Church. Some did explicitly judge that is a benefit to the Church (and to the faith).
- About a quarter of respondents mentioned how important **expansion or continued support of the youth programs** and of the **parents** are.
- About a quarter of respondents mentioned concern that we must **grow our membership**, with some identifying social justice or community-building events as ways to do this.

Other sentiments that were expressed :

- Several identified **Joys & Sorrows** as an important element of the worship services.
- The growth of the **music program** is seen to be good and central.
- Participating with **seminary internships** is important and helpful..
- Our **Caring Hands** is important and central.
- Our **website needs attention**. Idea: consider channeling the youth into doing something with it (and other social media).
- **Multicultural services** are very engaging.

On the current letter of agreement with the Senior Minister:

- The letter of agreement calls for **goal setting and monthly reports** to the Board by the minister. A sustainable but regular pattern of communication needs to be established.
- Membership Growth – this section of the Letter of Agreement has not been a focus, primarily due to the **lack of a lay committee** to lead and engage this effort.
- Committee on Ministry – this committee is defunct. The Ministers, Board and POC should decide if it is needed, and either recruit members or change the letter of agreement.
Committee on Ministry: We no longer have a functioning Committee on Ministry. Our most recent versions have been noble experiments, to which Frank Bosche notably (along many others) contributed with heart, but we never established a clear, useful, and sustainable mission for the group. In terms of ministerial support, the Pastoral Associates team acts as my best congregational resource. And Rev. Geoff provides invaluable ministerial support, wisdom, and partnership for my work.
- The section on compensation should be reviewed annually by the POC and updated. The **salary** of the senior Minister should be brought into better alignment with the UUA guidelines. The letters are not being updated yearly by the POC.
- **“Community Activities”** does not capture the “fire of commitment” of our faith. It does not express the urgency of our call to be in real relationship with our neighbors and kin beyond our walls, acting in solidarity for much-needed social change. Perhaps “Public ministries” is a little more explicit.
- **Social justice ministries** both *within* and *beyond* the congregation are not explicitly mentioned — that is, the role as ministerial partner in our personal and congregational development as the Beloved Community, as well as in our work for building Beloved Community in our wider world. Our minister is called to do these things, and is doing them, but they don’t show up in the Letter.
- **Relationship building within and beyond the congregation** is not explicitly mentioned. Relationships lie at the root of all our work as a faith institution. Within the congregation, the minister’s capacity to build relationships with individuals, groups, and the corporate whole influences the levels of warmth, cohesion, and trust in our community. These are the essential elements for our walking through life together (i.e., for our *being*) as well as for our capacity to *do anything* effectively. Beyond the congregation, building relationships is the means by which our Church makes Love visible. **In our relationships lies our power for transformation and influence based on our religious values.**

On the Ministerial Evaluation Process:

- The quality and thoroughness of the communication from the Board and the Congregation to the Minister was not addressed in the interviews. Perhaps the questions for the interviews need to be reworded.
- Given the effort required to produce a report by this process, perhaps every 4 years for a process that is this thorough makes more sense, with a ‘mini review’ once in-between.

On Vision 2020 (written 2015):

Regarding Vision 2020, during the interviews with congregants, most positively mentioned were:

- A **robust membership support system** that engages everyone from first-time visitors to long-time members and friends through programs that included social events and celebrations, diverse, support groups, and service to the congregation and to the community [A1]
- Worship, classes, and activities that **deepen personal spiritual development** and encourage the **expression of one's faith in the world** [W1]
- Congregation-wide participation in activities that promote **multicultural, anti-racist, anti-oppressive competencies**, including deep listening, compassionate communication, and understanding of systems of oppression [W2]
- **Coalitions and alliances** with interfaith, Unitarian Universalist, and secular organizations **working for racial justice, environmental justice, and economic justice** [B1]

Less frequently mentioned were

- Experiences in worship services, in church events, and through visual displays that **deepen one's awareness of multiple faiths and practices** [W3]
 - **Children, youth, and young adults** at the center of congregational life through classes, projects, worship, and intergenerational experiences [A2]
 - Our **facilities** structurally sound and updated to support our ministries [A3]
-

Guidance and Benediction From Rev. Nancy Palmer Jones

Healthy congregational life is in constant flux. We need specific goals and priorities to make real progress toward our larger vision, as well as to keep up with our changing world. Yet we must also “expect the unexpected” and **grow our patience, flexibility, self-forgiveness, and broken-openheartedness** when our progress toward our goals takes a detour or seems slow. More than anything else, **congregational ministry is a responsive dance.**

As we move forward from this moment of reflection, may we **focus our energies on these fundamental and interconnected spiritual disciplines:**

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Benediction

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— Rev. Nancy Palmer Jones
