

**Presbytery of San Francisco
Partnership Model Evaluation Team Report
March 24, 2021**

**Submitted to the Presbytery, Mission & Vision Leadership Committee and
Personnel Working Group**

Team Members:

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The **Partnership Model Evaluation Team (“PMET”)** was formed by the Mission and Vision Leadership (MVL) Committee in December 2020.

Task: Using the following criteria and goals approved at the August 2020 Presbytery meeting, and affirmed at the March 2021 MVL Committee meeting, the PMET was tasked with evaluating the Transitional Partnership Model (TPM), which includes the three Executive Partners (Partner for Congregational Vitality and Clergy Support, Partner for Mission and Church Assets, and Partner of Operations and Presbytery-wide Communications). The TPM was approved by the Presbytery initially in May 2020 and subsequently in August 2020 as a temporary model. The PMET assumes that the TPM will be in place until a Permanent or long-term staffing model is approved by the Presbytery. In its evaluation, the PMET asked the following question: **“is the Executive Partnership model a good long term fit for our Presbytery?”** The PMET was not charged with evaluating the performance of the individuals who are filling the Partners’ positions.

Evaluation Criteria:

Does the partnership model achieve the following principal goals?

1. (Will the model allow) the partners to communicate effectively, working together.
2. (Will the model allow) the partners to articulate transparent operating rules, in terms of decision-making.
3. (Will the model allow) the partners to implement the vision and goals articulated by MVL.

Does the partnership model set the Presbytery of San Francisco up for long term success in the following areas?

1. Expand collaboration among staff, committees and congregations and equip them to work to respond to concrete ministry needs in the diverse levels of our shared ministry.
2. Ensure committees and congregations are equipped to carry out their functions.
3. Develop and implement a communication strategy of intentional and effective communication between the partners, the presbytery and its committees.

4. Empower partners to envision and implement actions and ministries rooted in the vision and values as articulated by MVL, taking initiative as needed.
5. Expand volunteer participation in our presbytery government and ministry
6. Empower effective decision-making in difficult or divisive situations.

Response:

While we would have liked to give a clear cut “yes” or “no,” to the questions above, we recognize that authentically answering these questions would require more time and resources than allowed. We also recognize that as a six-member team we cannot know, or speak adequately on behalf of the majority of the Presbytery. Additionally, without knowing the vision and goals of our Presbytery (as articulated by MVL or otherwise,) there are inherent difficulties in determining the long term effectiveness of a collaborative partnership, or any, leadership model.

With these things in mind, we offer the following findings, which include a Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis and recommendations, based on a limited exposure of the model and anecdotal opinions. It is our hope that these findings will help MVL, Personnel, and the Presbytery of San Francisco at-large, to make motions and decisions about the direction of our Presbytery and future leadership models that benefit everyone who is privileged to call this Presbytery home.

We thank you for the opportunity to reflect on the future of our Presbytery and ask for grace in taking on a task that is more than any one person, or team can do alone.

With much respect and care,

Carmen, Randy, Nelson, Claudia, Karen and Lori

Attachments:

1. Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis matrix
2. Recommendations Summary

Transitional Partnership Leadership Model

Strengths, Weaknesses, Opportunities, Threats Analysis (March 24, 2021)	
Note to Reviewer: Other leadership models may have similar characteristics or strengths, weaknesses, opportunities and threats as the Partnership Model, but the Partnership Model Evaluation Team's (PMET) task was focused on the Partnership Model only.	
STRENGTHS	WEAKNESSES
Partners' previous staff experience (institutional knowledge, history, context)	Additional full-time administrative support likely needed for day-to-day ops, delegation, etc.
Continuity of Presbytery programs and operations without disruption	Missed opportunity for self-study and discernment recommended in time of transition, including process to reimagine and validate Presbytery Mission & Vision
Multi-person leadership team brings different, complementary expertise and skill sets	Potential blindspots inherent in preserving the status quo without outside perspective
Commitment and flexibility of three individuals in transitional exec leadership partner roles	Redundancy in communication with three leaders can be time consuming (Whom to contact? Who decides?); and, three leaders expected to lead with "one voice"
Demonstrated effective collaboration and collegiality; mutual support among the partners and other staff	Challenge in providing consistent oversight, constructive feedback and development of three partners by a rotating committee of volunteers (Personnel Working Group) <i>Question: How are disputes between the Partners and clergy/congregations raised and resolved, while protecting the rights and confidentiality of the parties? How does the Book of Order apply to this model?</i>
Current model is agile and responsive to dynamic needs in our churches and communities	Practicalities of coordinating and evaluating other Presbytery staff and contractors
	Difficult to evaluate the effectiveness of the model separate from the performance of the individuals in the leadership partner roles
	May lack bandwidth for current needs for pastoral care and crisis support
OPPORTUNITIES	THREATS
Continued momentum on current initiatives and priorities, e.g., Matthew 25 commitment; Crossroads Anti-Racism Training; Regional collaboration; COVID recovery	Risk of perpetuating a "closed" system by filling positions from within without external recruitment to hire
Shared leadership/division of responsibilities among three partners provides opportunities to strengthen communication and direct support to congregations	If one or more of the exec partners leaves their position, the model is destabilized and vulnerable, because the incumbents work as a team.
Ideas vetted from three points of view and to decide best paths forward	
Team approach creates opportunity for hiring individuals representing diversity in background, age, training, and expertise	
Increased opportunity for accountability and collaboration, to strengthen, affirm and improve their work	

Transitional Partnership Leadership Model
 PMET Recommendations Summary (March 24, 2021)

1. **Consider extension of the Transitional Partnership Leadership Model from May 2021 to 2023 (to be in place for total of three years).**
2. **Consider the retention of an Independent Consultant who would lead a presbytery wide process of self-study and reflection to guide the mission and vision for the Presbytery of San Francisco (“Presbytery”) and its leadership needs. Rationale:**
 - a. Transitional ministry benefits from an independent lens and outside perspective to analyze internal and external factors to inform and guide the organization’s direction.
 - b. Provides an opportunity to identify “gaps” in PSF’s support of congregations and pastors and develop plans and processes to support, correct, or address the issues.
3. **Focus areas for Independent Consultant in a temporary, contract role (12 – 18 months) would include:**
 - a. Engage a wide range of stakeholders (clergy and lay leaders, all demographic groups, those engaged and disengaged with Presbytery, etc.) to inform and determine the most effective leadership model and define the leadership skills needed to achieve the collective vision.
 - b. Lead and train others to facilitate listening sessions for targeted, measurable outreach to all members of our Presbytery to have the opportunity to share their experience and dynamic needs of their congregations, worshipping communities, etc.
 - c. Develop a matrix of Presbytery and congregational assets, needs, and opportunities. Analyze trends in congregational health and stability to identify and recommend potential Presbytery actions.
 - d. Creation of survey and data collection report to build a matrix of Presbytery and congregational profiles (disaggregating specific, confidential information when presenting findings). This work could be done with assistance from the PSF Stated Clerk and existing recordkeeping.

Proposed Timing

1.	Extend Transitional Executive Partners’ contracts for a two-year period from May 2021 through May 2023	May 2021 to May 2023
2.	Create job description, recruit and hire the outside, experienced Independent Consultant with certification in transitional/interim ministry to: A. Conduct presbytery-wide listening sessions to hear from members sharing their experience and thoughts about: <ul style="list-style-type: none"> ▪ Transitional Partnership Leadership model; ▪ How Presbytery staff and leadership are working to support clergy and congregations; and ▪ Hopes and ideas to inform the evolution of PSF mission and vision and leadership priorities B. Provide an executive summary report to Presbytery based upon survey data and feedback from at least 75% of presbytery members. C. Present findings to Presbytery about the mission and vision goals of the Presbytery and the best long-term leadership model.	June 2021 to October 2021
3.	Independent Consultant completes work, contracted for a tenure of 12 – 18 months	November 2021 to February 2023
4.	Organizational Structure and Leadership Recommendation to Presbytery for Approval	First Quarter 2023
5.	Develop plan for staffing and initiate recruitment to support leadership design	February – April 2023