



The value of reviewing the past

TN157 Training Notes series: Planning

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The word 'review' can be used for either an analysis of the present or a checking back on the past. In these notes I take it as going back over something in the past (with the aim of learning lessons for the future) – but you will quickly see that there is overlap between the two. Both are important aspects of planning but here I focus on reviews of the past.

Five types of review for church leaders and members

- 1 Your own life and work**
Your own personal review of your life and work (or a couple's marriage) over the past year or past week or of a specific event, either on your own or with a close friend or enabler.
- 2 Individual staff or volunteers**
A more formal review of performance against aims for the past year or term (eg. as part of staff or volunteer appraisal), or of a one-off or regular activity (eg. a project) or on leaving one's post (eg. an exit review).
- 3 Any team or group**
Checking out a one-off activity they organised (eg. for a group that ran a special church weekend) or a regular programme (eg. an element in a weekly church staff meeting) or committee review (eg. an assessment of recent meetings).
- 4 A leadership body**
An assessment of achievement in a church plan of some kind (eg. an annual exercise across a broad range of metrics as part of a Mission Action Plan).
- 5 Discipleship review for any of the above**
Checking back on personal or corporate spiritual growth over time, logging specific events and particular milestones in personal discipleship.

You will notice that some of these are focused on personal development and some on ministry capability, that some are part of a formal process yet others are much less formal, and that the list deliberately involves work, life and discipleship. Within all these you may be looking at self-development, specific achievements, or growth in relationships. The list is wide.

Five possible reviewers

It may seem obvious but there can be advantages in thinking more broadly than just the first idea that comes into one's head. Reviews may be carried out by a variety of different people.

- 1 **Self-review**
(eg. on a solo planning retreat) when you yourself assess the past year for your life, your work or your discipleship – or all three. This is a valid and useful exercise in itself but lacks the more objective approach when others may perceive things you are blind to.
- 2 **Peer-review**
(eg. when part of a team) when colleagues assess each other's performance either as team members or in their skills as employed within the work of the team or group, such as a preachers' group review of recent sermons.
- 3 **Manager-review**
(eg. as part of an annual appraisal) when a line manager or team leader reviews others 'from above' in some form.
- 4 **Customer-review**
(eg. as part of a survey) when taken among church members or visitors, or an exit interview, or a manager review 'from below'.
- 5 **180 or 360 degree review**
(eg. when several of the above means are used), possibly helpful when reviewing a church leader in his or her role.

Note that for some of these it may be wise to have an external enabler for the exercise.

A note on so-called customer or client reviews

The world appears to have gone mad on customer reviews. We are invited to assess our experiences of almost anything we buy, use, contact or have delivered these days, sometimes by means of pre-defined answers that rarely fit what we want to say. So be very careful not to overdo the review requests and annoy people in the process.

Then again we may be suspicious as to how valid some of the written recommendations of a product may be. Trustpilot and similar reviews are useful as an overview, but we can never be quite sure where the glowing commendations come from.

Five elements of any review

Although the list of types of review is wide, there will be a similar pattern of content for each one based on the following five elements.

- 1 **Prayer for the review**
Each element to be covered in prayer so that the elements of the review are seen in a right context. Review of any kind in a church or among Christians should be viewed as a spiritual exercise and so handled with great care.

- 2 **Bringing to mind the past**
Working through diaries, minutes, newsletters, reports, previous aims or just memories to recall outcomes that you may well have forgotten about whether concerning activities, people or processes.
- 3 **Assessing each item listed in the above**
There is a need for utter honesty in what in the outcomes was positive and what was not. It is helpful to assign some kind of ranking to each item listed.
- 4 **Learning lessons for the future**
Deciding for another time what might have been omitted, duplicated, or done in a better way and, equally, what succeeded or proved its worth as lessons to be learned for the future. A review of the past should be clearly directed towards the future.
- 5 **Making plans for the future**
Now you are able to make plans for the future based on the lessons learned. There should be a natural sequence of plan, action, review, then back to plan.

Five reasons why people are fearful of review

But many people shy away from this activity. It is important to identify reasons why people may omit it and bring these out into the open. Here are five possibilities.

- 1 **Fear of the outcomes**
We are frightened of showing up our own failure, especially if in front of others. Many leaders find a review exercise a challenge to their frail self-confidence.
- 2 **Judging others**
We do not want to judge others when we know we fail ourselves and so may be nervous about enabling a review or reviewing others in a way which if honest may need to be critical.
- 3 **Misuse of the process**
All review should be challenging and we do not want the challenge. But also some people may use the process to criticise others and put forward their own views.
- 4 **Too busy**
We think the process is over once we have a plan set out and then it is time to rush on to the next activity. Good review needs time and care. Its value will only be seen if it is done thoroughly.
- 5 **Poor past experience**
Some may have experienced poor quality reviews in the past with hidden agendas for staff or volunteer dismissal from their post or ministry. The process may then be given a bad press.

Five benefits of creating a culture of review

The following assume the church has developed a culture where review is normal and anticipated.

- 1 **A continuous aim to improve**
The church culture becomes one of seeking more effective ways of developing ministry and growing Christians into maturity.

- 2 **Lifelong learning mode**
The church sees disciples continually needing to grow in both faith and in how they run their life together in the community of a local church.
- 3 **Avoiding repeat mistakes**
The church should not be making the same mistakes year after year.
- 4 **A way of life for everyone**
With a review culture people can see that leaders have to submit to review as much as anyone.
- 5 **Spiritual growth**
Church members are encouraged to develop spiritually as is clearly expected in the New Testament.

Five dangers of creating a culture of review

But that does not mean that there are dangers too.

- 1 **Seen as a managerial approach to church life**
It can become a corporate exercise removed from spiritual roots, especially if based on a targets approach.
- 2 **Pastorally damaging for those who are fragile**
If handled without due sensitivity, a review exercise could hurt some people. This is a real danger: some will rise to the challenge, others might opt with their feet.
- 3 **Making plans and then asking God to bless**
The review may be based on unwise metrics which were not chosen after a search for wisdom. A review culture can include exercises based on unwise outcomes.
- 4 **Can be manipulated by those in charge**
Leaders can gear reviews to their own advantage or to the agenda they have chosen.
- 5 **It becomes an overworked exercise**
Review becomes something approaching an idol rather than a helpful tool for development.

Five not so common examples of church-based reviews

Finally, here are five examples of review in a church which you may not have come across before. Each is referenced with other resources on this website.

- 1 **Exit interviews for church members**
Training Notes TN95, *Exit interviews for everyone*, on this website explain how exit reviews work but suggest that they might even be considered when church members leave, whether because they are moving away from the area but also if they are leaving to join another local congregation. If they have found your church unable to meet their needs, it might be worth knowing this and why.
- 2 **Review of a committee's meetings**
Article A40, *Going deeper into meetings*, suggests that a council or committee's meetings might well be reviewed for their effectiveness in taking decisions over the course of a year. A great deal of time can go into a committee's work for relatively

little gain. It is worth assessing this. The same can be applied to any leadership team's meetings.

3 **360 degree reviews**

Training Notes TN144, *360-degree reviews for churches?* puts a case for the use of 180 or 360 degree reviews for church leaders. This can be an eye-opening exercise when different categories of reviewers see things in different ways.

4 **Asking visitors to review the service they came to**

Training Notes TN109, *A test for your church's welcome*, gives an idea for how to review your Sunday welcome. But the exercise really ought to be carried out by visitors not regulars, as they may take away a very different view from those in your present congregation. Worth a try, but take care.

5 **Reviewing people's discipleship**

This needs to be undertaken with great sensitivity but for those who want to take part Training Notes TN91, *An MOT for disciples of Jesus*, offers a possible framework for this. Note that this includes both review of the past and analysis of the present, the two meanings of 'review' mentioned right at the start of these notes. This is an exercise for individuals on their own or pairs who feel confident enough to share their findings.

So there are a number of five listed points about reviewing the past to plan for a better future. Note that in no way am I recommending that we live *in* the past, but that we learn *from* the past.

If you want to investigate the kind of review that analyses the present more than the past, see the Church Health Review on this website and its cut-down version in Article A35, *Mapping your church*.

These notes are available at <https://www.john-truscott.co.uk/Resources/Training-Notes-index> then TN157. See also Training Notes TN17, *Suggested questions for an annual review*, TN54, *Creating space for a planning retreat*, TN91, *An MOT for disciples of Jesus*, TN95, *Exit interviews for everyone*, and TN144, *360-degree reviews for churches?*

John's resources are marked for filing categories of Leadership, Management, Structures, Planning, Communication and Administration. File TN157 under Planning.

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