Towards an Understanding and Practice of Spiritual Metrics:
Measuring Spiritual Impact Faithfully and Productively in Christian Development Agencies, Missions Organizations, Schools, and Churches

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Chapter 1:
The Challenges and Promises of Spiritual Metrics: Understanding the Dynamics at Play and Guidelines for Best Practices
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I. Introduction

Christian development agencies, mission organizations, educational institutions and churches who want to have people come to know Christ and deepen their relationship of discipleship with Him, have a struggle on their hands: how do they know if they are having this kind of spiritual impact, and how do they know whether they are being as faithful and effective as they can be in this area?

Some of these organizations and institutions don't really worry about it: they do what they can in pursuing their missions, and let the results fall "as God wills." But many, or perhaps even most, are acutely aware of these nagging questions of impact and effectiveness, not least because more and more they are being asked by their boards, donors, denominations, parents, congregants, elders, staff and other stakeholders whether what they are doing in the spiritual realm is in fact "the best" they can do. The question of whether, why, and how to measure spiritual impact, the issue of "spiritual metrics" as we call it in this book, is therefore a pressing one for the many faithful Christian organizations seeking to be obedient to Christ and to His mandate to "make disciples" (Matthew 28:19), as Mark Forshaw describes in the next chapter of this book.

This is not a completely new phenomenon. In fact, questions of spiritual progress and spiritual impact have a deeply rooted legacy in Christian circles in what is known as the area of "discipleship." Under labels as diverse as spiritual growth, spiritual development, spiritual formation, spiritual transformation, faith development, growth in faith, spiritual fitness, spiritual maturity, spiritual vitality, and faith maturity, Christian literature and praxis focused on "making disciples" has been far-reaching. Myriad authors, including pastors, consultants, academics and theologians have written on these subjects; worked with churches, agencies, and Christian leaders to develop discipleship programs and train leaders in this area; drawn up websites with informative materials; developed a deep and rich theological approach and justification for discipleship concepts and insights and programs; and created a host of detailed and sophisticated "tools" and "approaches" such as spiritual self-tests and assessments, spiritual disciplines, and spiritual mentorship and directorship to help individuals and churches assess where they are spiritually and plan out and take steps to deepen their discipleship.[1] In this process they have fruitfully drawn on the secular and sociological literature on religiosity for insight and for developing an extensive set of implicit and explicit "indicators," specific things to look for that characterize spiritual impact,[2] to define and measure progress in these diverse areas that come under the field of Christian discipleship. And, as these authors detail, there is even more that can be mined from this secular literature. An annotated bibliography of these evaluation and planning tools, with the areas of discipleship on which they focus, and some sample assessment questions, forms Appendix A of this book.

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[1] See below, p. 21, for a more detailed exploration of these tools and approaches, and Appendix A for a list of resources along these lines.

[2] See, for example, (Hill & Wood Jr., 1999), for some 130 different scales measuring religiosity.

It might appear that given the plethora of Christian spiritual metrics tools that have been created to advance discipleship processes in individuals and churches, it would be a simple process to take these and easily and quickly adapt them to be used by Christian relief and development agencies, mission agencies, and educational institutions, and to enhance the tools that are currently available for churches. In fact, as most of the chapters in this volume give witness to, there is a lot of this that is going on. However, it is also evident from these chapters that there are significant theological, conceptual, organizational, and cultural tensions and struggles that come to the fore in the attempts to do so that in many cases, and especially in the cases of development and mission agencies, make it much more difficult than it would appear to be at first glance.

This book, hopefully and prayerfully, clarifies the sources of these tensions, the challenges that accompany them, and suggests a concrete way forward, including the adaptation, design, and use of tools and processes for those organizations interested in measuring, understanding, and deepening their spiritual impact and using spiritual metrics as a way to do so. While we are not claiming that being intentional and systematic about evaluating and planning for spiritual impact is the only way to accomplish this purpose, since other activities and approaches like prayer are an essential factor as well, we do believe that it is, dare we say, an important way to become better stewards of the organizations that God has led us to create and manage. But, as with just about all things of faithfulness and discipleship, it requires some work, and in some cases, substantial work, and this book hopefully provides a road map to guide those endeavors.

The book is organized into five sections. The first section is comprised of three chapters, including this one, which sets the background for the rest of the book by exploring and detailing the details the components of planning and evaluation that are required for any productive use of metrics, the nature of the particular challenges and tensions that are inherent in spiritual metrics, and puts forth a tentative list of best practices. The second chapter, by Mark Forshaw, looks at the reasons for why organizations are moving towards metrics, and what this all means for a practical approach to measuring spiritual impact that is faithful and effective. The third and final chapter of this section, written by Joseph Crockett, explores the theology of spiritual metrics, focusing on the theological underpinning of measuring spiritual impact, the spiritual dangers of measurement, and principles that should guide a theologically-based spiritual metrics.

The second section of the book, consisting of three chapters, is an overview of the theory and practice of measuring spiritual impact as currently constituted. These chapters explore, respectively, the breadth of application of spiritual metrics in terms of possible areas of evaluation and obstacles that need to be overcome for best results (Reesor); two different ways of approaching spiritual metrics based on two different kinds of research, a snapshot and a cycle approach, and how these inform best practices (McConnell); and the development and application of the "Engel" scale - a scale designed for measuring discipleship/evangelism impact on people and the environment with a range from hostility to Christianity to complete submission to Christ - to local level endeavors and the challenge of "scaling it up" to an application on the global level (Forshaw).

The third section is made up of six case studies of organizations in the process of implementing spiritual metrics, geared towards providing insight into the challenges and successes in doing so. The first chapter describes the REVEAL process that Willow Creek has developed and that has been used with other churches to improve discipleship processes at that level (Parkinson). The second chapter details the kinds of approaches currently being used in Christian educational institutions and the development of spiritual metrics by Taylor University's Center for Scripture Engagement that are being used by thirteen colleges for their spiritual life assessments (Collins and Bird). The third chapter looks at the process which Hope International, an evangelical microfinance organization, has undertaken to develop a robust and holistic approach to spiritual metrics, integrating it with their other economic and social indicators in their monitoring and evaluation systems, and the challenges they have faced and insights they have gained from doing so (Rohrs). The fourth chapter details the use of a qualitative, story-based evaluation method called "Most Significant Change" by Tearfund, an evangelical development organization out of the UK, to assess spiritual and social change, and the creation of a quantitative spiritual metrics approach used to analyze that qualitative data (Dejean and Varys). The fifth chapter traces the evolution the approach to spiritual metrics being used and refined by The Seed Company that has allowed them to measure the impact that Bible translation has had on individuals and cultures, and that promises to help them discern and prioritize the portions of scripture to translate in new settings (Gravelle). The sixth and final chapter of the case study section describes the development and use of cutting edge technology and digital tools for spiritual metrics around Bible engagement, and the potentials and pitfalls of those tools (Roberts).

The concluding section of the book is made up of one chapter and one appendix, the latter being an annotated bibliography and sampling of the spiritual metrics and discipleship tools being used today. The chapter summarizes the conclusions and the principles drawn from the book around the "best practices" for spiritual metrics, focusing on concrete guidelines and suggestions for how those interested in using spiritual metrics can best do so. And, it ends with a strong caution that while there is a temptation to simply use questions, surveys and tests that are out there to measure spiritual impact, the most faithful use, adaptation, and creation of tools is based on having a good understanding of all that is involved in this endeavor, and the challenges and possibilities it presents. It is our belief that this understanding is not overly complicated nor complex, and we hope that this book makes it easy to understand. But, it does require a bit of time and investment to understand the foundational elements and how to apply them, as with any endeavor that is worth doing. It is to these that this chapter now turns.

II. The Foundational Elements of Spiritual Metrics: Organizations, Evaluation and Planning

Introduction

An understanding of spiritual metrics has to begin with an understanding of the basic elements of planning and evaluation that take place within an organizational context. This section first looks at each of these basic elements and how they fit together and then explores two types of challenges in planning for and evaluating spiritual impact: challenges that are inherent because of the nature of Christian spirituality, and challenges that come from organizational type, culture, capacity, and operational location. Building on this base, this chapter then reviews the types of tools that have been used in spiritual metrics especially for individuals, groups, and churches, and lays out seven "best practices" for all those organizations who are seeking overcome those challenges and engage in a fruitful measurement of the spiritual impact of their programs.

Understanding Organizations, Planning, and Evaluation

Organizations are generally created for a purpose. People see a need, are called by God to do something about it, and create an organization as a way to best accomplish that, much as the apostles did as described in Acts 6 in response to the problem of the feeding of the Grecian widows (Acts 6:1-7).

An organization gives you the capacity, through a division of labor, to do things you could not do individually or to do them more effectively. So, for example, a development organization is created to make life better for children in a particular community; a mission agency is created to get people out to plant churches; a church is created to provide fellowship, a place to worship, and help believers grow spiritually and equip them to do the works that God has prepared for them to do; and a school is created to give students the best education possible and help them develop the skills they need to be faithful servants and live abundantly. In short, Christian development organizations, mission agencies, educational institutions and churches are organizations that have been created to marshal people and resources for particular purposes and goals. For the organizations in which we are interested, at least one of those goals is spiritual in nature (many would say that all of their goals are spiritual in nature): having a spiritual impact on the people who they are serving.[3] While organizations may be of different types and as such function with different kinds of constraints, limits, and possibilities, they also face common challenges, such as defining their purposes and goals; designing (planning) activities to achieve those goals fully, with the highest quality (effectiveness); achieving those goals by making the best use of, by being the best steward of, the resources entrusted to them (efficiency); and learning from experience (evaluating) to improve all of the above. They face, in other words, the challenges of planning and evaluating.

We all plan and evaluate. All organizations plan and evaluate. It is just a matter of how we do so and how systematic we are about it. The level of awareness, intentionality, and systematization of planning and evaluation in which organizations engage, and the quality with which they do so, has to do with a number of factors, including people's fundamental beliefs in the usefulness of different kinds of planning and evaluation, as well as their experience and capacity to use planning and evaluation tools for the best results. Some, for example, have foundational beliefs, such as "continuing revelation," that may lead them to be suspicious of systematic approaches to planning and evaluation because they feel that it leaves little room for God and the Spirit's direction, tempting people to rely on their own efforts and believing themselves responsible for bringing about the desired outcomes. Others may feel that systematic planning and evaluation impose a straightjacket that diminishes flexibility and the ability to seize opportunities as they arise, leading to organizational dullness and lack of vibrancy. Many, perhaps most, are hesitant to engage in systematic planning and evaluation either because they just don't quite know how to do it, or don't know how to do it well, or because of the time and resources that it seems to require that don't appear to be available in the midst of trying to keep up with and encourage the good work already going on.

All of these barriers, and others, to planning and evaluation are present to a certain degree in all organizations. All of these also contribute to the challenges that organizations have when it comes to measuring spiritual impact. This means, therefore, that a clear understanding of the fundamental tenets of planning and evaluation within organizations will help us gain a clear understanding of what is involved with spiritual metrics, and this is the focus of the next few sections of this chapter. We start out by looking at what is involved in planning and evaluation, and take a quick look at what organizations are doing along these lines. This will set the basis for then identifying the challenges for spiritual metrics, and offering suggestions for how those challenges can be addressed.

Planning: An Organizational Imperative

Introduction: Causality and Theory of Change

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[3] One would hope that another universal goal would be to have a spiritual impact on the people who work in the organization. For more on this, see below.

As stated above, all organizations plan in some way or another. All organizations, at some level, have things they want to achieve – called purposes, goals, objectives, outcomes, outputs, deliverables, results and other kinds of synonymous, interchangeable labels - and a set of activities for how to achieve them – generally called "activities," "inputs," or "strategies."[4] The essence of planning lies in thinking through the causal link between them, between how and why the activities will bring about the results you want to accomplish. This causal link, the understanding and description of how and why certain activities will bring about certain changes, is called a "theory of change." This theory of change underpins four of the most important factors or dimensions of any kind of planning exercise: the scope and degree to which you define what you want to accomplish, in other words, the scope and degree to which you have defined your specific goals; the scope and degree to which you define the theory of change itself, explaining how and why certain actions will lead to accomplishing what you want to accomplish; the approach you take to engaging the people who are subjects of the programs; and the parameters you set for defining and analyzing the context in function of creating your theory of change. In what follows, we review all three of these foundational dimensions of planning.

Defining What Is to Be Accomplished (Goals/Objectives): "Conventional" vs "Activities-Based" Planning

First, in terms of the scope and degree of definition of results, there are two main approaches to defining what the organization wants to accomplish, what goals you are seeking to achieve. A more systematic approach, one that defines right off the bat what you want to achieve in terms of impact in a relatively concrete and specific way, is a more "conventional" approach to planning, whereas one that pays less attention to defining specific impact and engages in activities with a general sense of where one is headed, even perhaps as a bit of exploratory mindset, is a more "intuitive" or "directional" approach(McCaskey, 1974). This directional approach, also labeled by some as an "activities-based planning" approach, can be manifested in at least two ways. First, it can be generally characterized by an emphasis on carrying out activities with a short-term purpose in mind, seeing what comes of them, and then creating another set of activities based on those results with a subsequent short-term purpose in mind. Second, it may be used by organizations that are committed to one particular type of activity across the board, such as well-drilling or Bible translation, as their end goal.[5] Organizations and projects that are new, that are still finding their way in their relationship with the people with whom they are working, will tend to engage more in this kind of approach until the understanding of and commitment to longer-term objectives and goals matures.[6] A more conventional approach to planning, on the other hand, defines both short-term and long-term objectives right up front, and then identifies the activities to be carried out in function of accomplishing those objectives.[7]

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[4] See (Rugh) for a wonderful chart listing how different agencies use these terms in different ways.

[5] Note, however, that even with this "activities-based" approach there will be strong elements of conventional planning that will be used in order plan the successful implementation of those activities. With Bible translation, for example, a whole process of planning of how to carry out a successful translation of the Bible in a particular context will have to take place that will include clearly defined "sub-activities" that are necessary to accomplish the overall activity of translating the Bible. There is always a fuzzy line separating the definition of "activities" from the immediate "results" or "objectives" that they accomplish, and this is such a case. For example, translating the Bible can easily be labeled an "activity" as much as it can be labeled an "objective" or a "goal," depending on how one decides to define those words. The important thing is to focus in on what one wants to accomplish and how to bring that about, and not get caught up in fruitless discussions over definitional labels.

[6] In fact, during the early stages of a project, it may be unproductive to define ultimate objectives, since the definition of those may be a process, carried out over time, where objectives change as activities are undertaken and the results bring about changes in the attitudes and desires both of the people with whom the organization is working and with the staff itself.

Defining How to Accomplish the Objectives: Theory of Change

The second foundational dimension of planning is the degree to which the organization spells out its theory of change, the causal links between the activities it undertakes and the objectives it is trying to accomplish. In the more activities-based approach to planning there tends to be little systematic energy and effort geared towards thinking and reflecting on a comprehensive theory of change, on a robust detailing of the causal links. Rather, any kind of reflection tends to be more along the lines of a more intuitive understanding of "if I do this, then this will result" with little thinking about why that is the case, what is causing it.[8] In a more conventional approach, the 'theory of change" is specified more systematically and concretely, identifying as many variables as possible that are at play in function of the objectives sought. The idea is that the more one identifies the causal path and the complexity of the variables involved in this process of change, the more likely it is that the project will be able to be planned in such a way as to achieve its projected goals and prevent "unexpected consequences." As many perceptive authors have commented, it is, of course, impossible to identify all of the variables involved because of the complexity of human behavior and culture, and the usefulness of this planning exercise can be seriously curtailed if it leads to confidence, arrogance, and a rigid approach that eliminates flexibility required as new information comes to light.

Today, very few organizations are given leeway to engage in intuitive planning as an overall method, although there is more openness to this approach in the initial stages of new initiatives and exploratory projects. But even this tends to be severely curtailed because, as Mark Forshaw points out in the next chapter, donors increasingly tend to demand that clearly defined goals and theories of change be outlined comprehensively. However, in practice, the type of planning approach actually used is much more mixed. Organizations of all kinds often have less than clearly defined objectives that guide their practice, and have rarely systematically thought through their theories of change, because of theological misgivings towards planning, time constraints, and lack of knowledge of how to do so. For all of these reasons, there tends to be much more activities-based planning going on in organizations than what meets the eye, even if the organizations tend to talk the talk and "play the game" of conventional planning as part of their rhetoric (Bakewell & Garbutt, 2005).

Defining the Engagement with People: "Participation"

There is a third foundational factor to planning which has to do with the choices one makes on how one engages the people who are subjects of the programs. This issue has been the source of much thinking and writing, generally under the label of "participation." The degree to which one includes the participants in the processes of planning, implementation and evaluation can vary tremendously. Ranging from little to no inclusion, to having the people lead these processes themselves, this spectrum has been identified with many labels ranging from "non-participatory vs. participatory," "top-down vs.

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[7] Both of these approaches have their respective critics. A more conventional approach at times is criticized for its lack of flexibility and for its tendency towards a bias in belief that it can control outcomes, although this tends to be more a function of how it is managed. See (Rondinelli, 1982). A more activities-based approach is criticized for its lack of strategic thinking and not using resources as effectively and efficiently as it might.

[8] There is, therefore, significant knowledge that is exercised by those engaged in this kind of approach, and some approaches to evaluation, especially the "systematization" processes out of Latin America, seek to draw out and examine this knowledge, to "bring to light the theory that is in practice" (Barnechea, Gonzalez, & Morgan, 1999, p. 39) of those whom Schön has called "reflective practitioners" (Schön, 1983).

bottom up," "directive vs. non-directive," "dialogical vs. anti-dialogical," to "imposed vs. facilitated."[9] In short, in each area of planning, implementation, and evaluation, a choice is made, whether intentional or not, of how to engage people, and there are significant consequences this choice has for issues like "ownership," "capacity-building," "empowerment," "transformation," and "sustainability" that are so vital for the ultimate impact and effectiveness of programs.

Defining the Parameters of the Analysis of Context: "Problem-based" vs. "Asset-based" Planning Frameworks and Issues of Power, Culture, and Emotions

Finally, deeply affected by the issue of "participation," there are two main approaches to researching and analyzing the context in which one is working as one is trying to define what the objectives should be and what activities should be undertaken to accomplish them. In other words, there are two main methods for defining a theory of change: a "problem-based" and an "asset-based" approach.

The problem based approach, which includes well-known methods such as the logical framework, the logic model, and results-based planning, spells out the objectives and the causal link between the activities and the objectives by first analyzing the problem that is to be tackled, what the roots of the problem are, and then based on that analysis comes up with the objectives and activities that will counteract that problem. This approach has been praised for increasing people's critical reflection in identifying the factors and variables at play, and criticized for creating a negative atmosphere, ignoring what people bring to the table and turning them into problems to be fixed, and for leading to overconfidence that the results can be achieved as mapped out. The asset-based approach, encompassing methods such as appreciative inquiry, values-based planning, and community capitals, starts out from a very different place. It looks at what is working well in a community, what assets the community has, what values the community governs itself by, what the community dreams for itself, and based on that analysis comes up with the activities that will lead to achieving those dreams. This approach has been praised for creating a positive attitude, bolstering the values that hold people accountable during the process of change, and recognizing what people have to contribute, while criticized for glossing over dimensions of power that make it difficult to apply it fruitfully in situations of inequality and repression. These approaches and the tools associated with them can be and are mixed and matched, but they still represent two major, different ways of approaching the planning exercise.

In carrying out this analysis and in defining the objectives and the activities to accomplish them, there are dimensions of power, culture, and emotions that come into play whether people are aware of them or not and that significantly affect the planning, implementation, and evaluation dynamics. These dimensions include differences of perspectives and values, knowledge and beliefs, control over resources, and the nature of relationships, and they are intimately interrelated with each other. Many times planning, implementation, and evaluation processes get into trouble because they don't take them into account either in terms of analysis or action and over the years practitioners have created tools to force these dimensions to come to the fore as subjects of analysis. For example, gender and conflict analyses look to surface relationships of power and what divides and connects a community (Moser, 1993; SIDA, 2006); a sustainable livelihoods analysis demands a consideration of the power structures that mediate and constrain people's daily lives ("Sustainable Livelihoods Guidance Sheets: Introduction," 1999); and a participatory narrative inquiry is used to consider the different "values, beliefs, feelings, and perspectives" at play (Kurtz, 2014, p. 86). All this is to say, therefore, that the way one approaches an understanding of the context and people with whom one is working holds significant implications for the way one plans and evaluates and the outcomes of the project.

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[9] For various ways of labeling, portraying, and explaining these scales, along with other terminology, see (Blackman, 2003, p. 27), (Cousins & Chouinard, 2012, pp. 26-28), and (Corbett & Fikkert, 2012, p. 140).

Conclusion

The choice of what type of overall planning approach to take, either a "conventional" or an "activities-based" one, will depend on many organizational and contextual factors, and one is not necessarily better than another. In fact, organizations may mix and match them across their programs, or even as they evolve in their mission and focus. Likewise, the choice of using a "problem-based" or an "asset-based" approach to analyzing the context will also depend on the situation at hand, with neither being superior to the other in principle. The more intentional one is, however, in defining the theory of change that is guiding the planning formally or informally, the approach one is taking to engaging the people benefitting from the program in the planning process and why, and the degree to which one is taking into consideration and addressing the dimensions of power, culture, and emotion of the context in which one is working, the more likelihood there is that the planning process will be useful. All of this, however, will fall short if evaluation is not built into the planning process, and it is to an analysis of why that is the case that we now turn.

Evaluation: A Planning Imperative

Introduction: The Purposes of Evaluation- Improvement, Exploration, Proof, Advancement, and Marketing

As stated above, in the same way that all organizations plan, all organizations also evaluate. They do so in one way or another, under labels as varied as "evaluation," "monitoring," "assessing," "learning," or "systematizing," and that evaluation is intimately and inherently linked to planning. All organizations have people who are thinking about whether there is a way that the organization can improve what it is doing; whether there is a way to use resources more efficiently; how to understand and solve problems that come up during the implementation of programs; how to figure out what is working and why so that it can be used somewhere else or shared with others to help them do something similar; how to explore what the impact of the activities has been; how to "prove" that what the organization is doing is making a difference; how to engage people in the evaluation so that the evaluation process itself helps them to further the goals of the project; and what kind of information to gather to report back to a donor.

The purposes of evaluation, therefore, are a bit more varied than the purpose of planning which is to seek to bring about intended results and can be grouped into five categories: those designed to improve programs, to market the programs, to explore impact, to prove impact, and to advance impact. The first four fall into what might be called a "practical" approach to evaluation, while the latter is a more "transformative" one (Cousins & Chouinard, 2012, pp. 22-26).[10] In what follows, we quickly review each.

1. Improve Programs

   First, evaluation and assessment can be used to gather information that is then used to plug back into the planning process to "improve the programs" that the organization is running, meaning that the programs will then be able to more effectively and efficiently achieve the results the organization is seeking to achieve.[11] The information can be used to make activities more effective and efficient, to create new activities and strategies to better accomplish the objectives,[12] or to sharpen or change the objectives themselves if they have proven to be ambiguous or unrealistic or if the people with whom one is working have changed their minds about what they want to accomplish. Tailoring an evaluation to bring to the fore "lessons learned," and feeding those lessons back into the programming to improve it, is perhaps the most common purpose given for evaluations in any planning, monitoring, and evaluation literature.

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[10] In this work, Cousins and Chouinard use these terms in the context of their analysis of "participatory" evaluation, but they fit here as well. This distinction was originally coined by (Cousins & Whitmore, 1998).

2. Market Programs

Second, measurement and assessment can be driven by a "marketing" desire to gather data to inform any number and type of stakeholders and constituencies of the organization, including financial and material donors, prayer supporters, volunteers, beneficiaries, and even the "industry" as a whole. Generally, donors are the stakeholders that carry the most weight in this second purpose for evaluation, and using data, stories, and examples to show that one's programs are successful, and thereby worthy of support, has tended to be viewed as vital to organizational survival. In fact, it can be argued that gathering information to present to donors is the main practical purpose of most evaluations currently being conducted. As we argue below, giving priority to this purpose over others should be approached with extreme caution, since there are significant temptations to shape the method of the evaluation and the content and tone of reporting in a way that blinds the organization to the full range of impact and ignores negative outcomes and how those should be addressed. In short, the marketing purpose for evaluation should probably take a back seat to the other purposes for evaluation, being regarded as more of a significant by-product of effective evaluation as opposed to the main purpose for it.

3. Explore Impact

Third, evaluation can be drive by a desire to explore the actual impact that an organization's programs are having. This may be the case particularly in activities-based planning, where the impact is uncertain, but it may also be the case for programs that take a conventional approach who wish to see if there are impacts beyond the ones they had planned for that are also occurring. There may be "unintended" or "unexpected consequences" (impact outside what was planned) that are either positive or negative that the organization wishes to identify, and depending on the results may feed into any of the other purposes as well.

4. Prove Impact

Fourth, there has been growing pressure on some organizations involved in social and spiritual change to "prove" that their programs, their activities, are in fact the ones responsible for bringing about the changes claimed. This movement finds its strongest expression in those pushing for "Randomized Control Trials" (RCT), that was promoted heavily at first in the field of microfinance but is slowly spreading to other areas of social and spiritual change as well. [13] However, more recently there has been a rethinking about the usefulness of focusing evaluations on a simple proof of effectiveness, and a corresponding call for combining this purpose with the purpose of gathering information that will be more useful for improving programs (White, 2013).

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[11] See, for example, (Bonem, 2012, p. 107) quoting Greg Hawkins on how it is important to have "some thoughtful way of understanding how your resources are working to produce life change and movement toward Christ…If there is something available, that with rigorous thinking and application of the mind God gave you can make you a little better, you have to pursue that. Otherwise it becomes like malpractice."

[12] One example of this was The Council for Christian Colleges and Universities' (CCCU) use of assessment to sharpen their theory of change (*CCCU Report on Spiritual Formation*, 2011, p. 17).

5. Advance Impact

   Finally, fifth, evaluations and assessments can be a means for furthering the achievement of the project objectives themselves, in that the process of carrying out an evaluation can be designed in such a way as to in and of itself be part of the process of change. So, for example, an evaluation of spiritual impact that is designed to be planned and carried out by the people with whom one is working may very well lead in and of itself to accomplishing the objective of a deepening of the spiritual growth as the people discuss and reflect on what has been achieved or not and why in this area.

The importance of this analysis of purpose lies in the fact that it is generally the case that the particular purposes are served best by evaluation methods geared specifically to them individually, and believing that one can achieve them well all at the same time with one approach can lead to frustration in practice. In what follows, we look at why, examining first the four foundational focuses of evaluation and then the two overall methods that can be used.

Defining the Focus of the Evaluation: Activities, Impact, Theory of Change, and Reasons

While there are at least five potential purposes for an evaluation, there are also four different focuses that an evaluation can take. First, an evaluation can assess the degree to which the activities were carried out as planned, looking both the quality of how they were carried out and the quantitative elements involved, such as numbers of people participating and their demographic characteristics. In other words, one can evaluate what some label as the "inputs" of the project.

Second, an evaluation can assess the impact that those activities had, what some label as the "outputs" or "outcomes" or "consequences" of the activities. It is important to notice that you can measure very different aspects of the degree and scope of the outputs, ranging from looking at short-term outputs (generally labeled as a "monitoring" of the impact of the project) to long-term ones, to "intended" vs. "unintended" consequences of the activities. The measurement of the "intended" consequences, in other words the measurement of the degree to which the planned objectives were accomplished, is usually carried out based on what are called "indicators" of achievement, and these indicators are usually set up along with the specification of the objectives during the planning process. So, for example, if one of the objectives of the project is to have "Church members reading their Bibles more frequently," the indicator would specify the dimensions of that target, usually having a quantitative and a time element. In this case, therefore, the indicator might look something like "50% of church members were reading their Bibles at least once a day over the last year."[14]

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[13] See, for example, Bruce Wydick's presentation at the Accord Network conference in 2012 (Wydick, 2012). See also (Banerjee & Duflo, 2011; J.L.P., 2013; Karlan & Appel, 2011).

[14] This is what is meant in referring to "SMART" indicators: they are to have elements that make them, in the order of the acronym, (s)pecific to the objective, (m)easurable, (a)ttainable, (r)elevant, and (t)ime-bound. Different conventional planning approaches have different ways of drawing and writing these up. For example, some might put the specifications right into the objective and do away with the indicator. In any evaluation plan, you would also specify your source of information to measure the indicator. In the example above, therefore, your source of

Third, an evaluation can assess the degree to which the theory of change, the specification of the causal link of how and why the activities were to lead to the accomplishment of the objectives, proved to be correct or not. Finally, fourth, an evaluation can ask the "why" as opposed to just the "whether" questions contained in all three of these focuses of evaluation: why or why not the activities were carried out to the degree planned and with the quality desired; why or why not these activities had the impact intended, and why they had unanticipated consequences; and why the theory of change was correct or not.

Each of these four focuses can be tackled independently of each other, or in any combination. The easiest, and most frequent form of evaluation is the first, assessing the degree to which the activities were carried out, as opposed to the impacts they had – measuring inputs rather than outputs. This level of evaluation in general comes in for significant criticism because it can take attention away from measuring what is most important, the impact of the activities,[15] but for any evaluation of impact it will be important to consider whether the activities were carried out well or not. Measuring impact, on the other hand, tends to be significantly more difficult because it usually requires thinking through how one will measure changes in people's behaviors and beliefs, but more and more is being required along these lines by donors and other stakeholders. Assessing the theory of change is rarely done, primarily because it is rare that a theory of change is clearly articulated. And, finally, asking the "why" questions is usually always present, many times more informally than formally, and is very much dependent on the degree and depth to which both the planning and the evaluation have been well specified and thought through. However, each of these focuses requires a particular method of gathering information, and there are two overall methods from which to choose. It is to these that we now turn to round out our exploration of the basic building blocks of evaluation.

Defining the Overall Method: Qualitative vs. Quantitative and Level of Participation

There are two main methods of gathering information geared toward evaluation, as there are to any research: a qualitative and a quantitative method. A qualitative approach consists of gathering information from people in a narrative form as they communicate their opinions, understandings, and emotions, and then analyzing it for patterns and insights in function of the purposes and dimensions of the evaluation. It uses such tools as individual and group interviews, focus and discussion groups, storytelling, play and performance theatre, and the arts. Traditionally, the qualitative approach to evaluation has been focused on interviews and discussion groups, but more recent trends have incorporated storytelling to a significant degree, drawing primarily on the "Most Significant Change" approach, as detailed by Gravelle and Dejean and Varys in their case studies in this book. The qualitative approach tends to yield information that is more helpful for the purpose of feeding back into the planning process to improve programs because it more easily answers the "why" questions; for the purpose of marketing the programs with stories that touch donors' hearts; for assessing the theory of change and the full range of impact; and for the "transformative" purpose of advancing impact.[16] It tends to be more time consuming, and is still regarded by some as a less "scientific" and therefore

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information might be a survey of church members asking them how frequently they had read their Bible in the last year. See (Rickett & Morrison, 2009) for a focus on an "outcomes-based" approach.

[15] See, for example, ("Are We Using The Wrong Tools To Measure Our Spiritual Growth?," 2012), (Bonem, 2012, p. 99), and (Oke, 2013).

[16] See, for example, (Rushton, 2013): "In the meantime I think narrative is our best form of measurement in the spiritual journey. It can be helpful to tell stories of transformation, and talk with people about where we are struggling and where we are seeing growth."

"objective" approach, but donors seem to be leaning more in that qualitative direction (Gravelle, 2013, p. 8).

A quantitative approach consists of gathering information in the form of numbers and then analyzing it to also detect patterns and insights in function of the purposes and dimensions of the evaluation. It uses primarily the tools of surveys and questionnaires, with the answers to the questions registered as a number on a scale so that they can be tabulated and analyzed numerically. The survey questions can be designed specifically for each context, which usually requires first engaging in qualitative work to identify the most pertinent issues and the particular words and phrasing of the questions to fit the context, or they can be taken from a bank of questions based on those used to gather data across cultures such as the Human Development Index, Multi-Dimensional Poverty Index, and the host of Quality of Life indices that have been created. Many times the quantitative approach will use what are called "proxy" or "cipher" indicators or variables that point to something that you want to measure but have a hard time doing so from a numerical point of view, such as church attendance representing commitment to the Christian faith. The quantitative approach tends to yield information that is useful for monitoring and spotting trends, measuring progress towards objectives, aggregating data from across programs and countries, and marketing the programs. It has a tendency to lead to an overlooking or ignoring of critical social factors since they are hard to measure quantitatively, to focus attention on more material and physical aspects of the project since those are easier to measure numerically, and to give an illusion of "scientific" legitimacy to its results that tends to evaporate when scrutinized closely.

Both the qualitative and quantitative approaches share some common methodological foundations, can be used for similar purposes, and can feed into each other. Both methods work best in an evaluation when there is an established baseline, an analysis of the situation before the organization's programs started to be implemented, against which the results of the programs can be assessed to see what changes occurred. Both methods can use sampling approaches and randomized control trials (RCTs) geared towards confidently generalizing their results and "proving" that the changes that occurred were in fact due to the activities carried out by the programs. Both methods can be used to "triangulate" information in order to ensure that the information is valid. And, both methods can and do feed into each other and can be used to support each other. A quantitative approach would be impossible to employ fruitfully if it were not based on a qualitative approach that identified what the subject of the questions should be, and a quantitative analysis might surface a pattern that a qualitative approach had missed and lead the organization to explore it more fully with qualitative means. As can be seen, both of these approaches have advantages and disadvantages, and in reality most organizations committed to evaluation employ both, taking a "mixed methods approach," depending on what they are trying to achieve with various aspects of their evaluations and the kinds of information they seek to gather.

Finally, no matter what kind of method one chooses, there will always be the question of the degree to which one engages the people in the process of evaluation, just as with planning. The levels of participation of the people benefitting from the projects can vary across the various aspects of evaluation, including planning the method of evaluation, the determination of indicators, the gathering and analysis of information, and drawing up and using the conclusions. The decision of to what degree to adopt participatory approaches in all of this depends to a large degree on the purposes for which the evaluation is being carried out and the best ways to achieve them given the particular contexts, resources, and questions of power and culture.[17] Given the fact that usually the default option tends to be to use non-participatory evaluation approaches because they appear to be easier to carry out in terms of time and control, organizations should force themselves to seriously consider participatory ones since in many cases they are more effective in achieving many of the purposes set out.

Conclusion

In summary, all organizations and the people in them are engaged in evaluations of some kind. As organizations consider how to evaluate, it is important that they first clearly define what they want to accomplish with their evaluations. Do they want to gather information that will help them improve their programs, prove their worth, market their accomplishments, explore their impact, or advance their impact, or any combination of these? Defining the purpose will help them decide the focus or focuses of the evaluation, whether they want to concentrate on assessing the activities that were carried out, the impact they had, what the link was between the two (theory of change), and the reasons for why that underpin all of these. Defining the purpose and the focus, finally, will help organizations determine what kind of methods they will use for the evaluation, choosing between or mixing qualitative and quantitative approaches and determining the level of participation they will allot to the people who are the subject of the programs. All of this will be made much easier if there has been a robust process of planning that is guiding the implementation of the programs and into which the planning for evaluation has been integrated. And, given the fact that evaluation takes time and resources, it is crucially important that organizations choose carefully and wisely the scope of their evaluation plan. It is much better to start out very small and actually carry out the evaluation, rather than trying to address everything under the sun and end up in frustration for all involved and gives little fruit. This is especially the case when the subject of measurement is spiritual, since that area of metrics holds special challenges. It is to those challenges, and the reasons for why they exist, that we now turn.

III. Spiritual Metrics: Fundamental Challenges

Introduction

As stated above, Christian development organizations, mission agencies, schools, and churches are all seeking to have some kind of spiritual impact, and are engaged in planning and evaluation to some degree. It is often the case that their planning approaches are not as robust as they might be, a subject that will be revisited below in the section on organizational capacity.

However, even if the organizations have their planning side of things in relatively good order, the area of spiritual impact presents particularly difficult constraints and challenges because of the nature of spirituality. In fact, this is one of the reasons why so many organizations have felt stymied when considering planning and assessing for spiritual impact. These challenges and constraints that make engaging with discipleship tools and metrics so difficult are of two kinds:

1) Inherent challenges to adopting a conventional, systematic method of planning and evaluation because of the particular nature of spirituality.
2) Challenges brought about by organizational type, capacity, culture, and operational location.

We now turn to exploring each of these fundamental challenges that make spiritual metrics so difficult, so that we can then look at ways of addressing them.

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[17] See, for example, (Cousins & Chouinard, 2012, pp. 244-245).

1) Inherent Challenges to Spiritual Metrics Due to the Nature of Spirituality

There are five fundamental challenges to spiritual metrics and planning that are related to the particular nature of spirituality:

1. The range and scope of the possible kinds of spiritual impact make it difficult for organizations to define and prioritize them.
2. The kinds of spiritual impact they would like to have are subject to their own cultural and doctrinal biases and many times don't necessarily align with local ones.
3. Because of the scope and complexity of the variables that cause spiritual impact, it is very difficult for organizations to detail a robust theory of change, to detail a robust understanding of what kinds of activities will bring about the spiritual impact desired.
4. Given all of the above, it is very difficult for organizations to come up with a universal set of activities and objectives that will be impactful and relevant across cultures.
5. The spiritual impact measurement process itself is riddled with practical and theological difficulties, including the fact that spiritual growth is not a linear process.

In what follows, we explore each of these.

1. Problem of Scope and Definition

First, it is very hard for organizations to identify specifically the kind of spiritual impact they want to accomplish because of the range, scope, depth and complexity of things spiritual. Since Christ is Lord of all, discipleship encompasses an almost innumerable set of areas of life in thought, word, and deed. This means, therefore, that specifying the exact objectives that one would like to see people achieve spiritually means having to choose or define them among multiple worthy ones, or making a list that is a mile long. In short, the definition, choice, and prioritization is very, very difficult and can be perplexing. It is no wonder that there is significant ambiguity in Christian circles about what spiritual growth and maturity actually means, and a general lack of "clarity around desired results" in this field (Bonem, 2012, p. 99).[18]

2. Problem of Cultural, Doctrinal and Theological Bias

Second, and related to the first, when spiritual objectives are defined, they tend to be culturally, doctrinally, and theologically biased, as Crockett details in his chapter in this volume. One might think that the Bible gives clear and universal guidance on the markers of spiritual maturity, but church, missions, and development history have shown that the interpretation and application of these markers, the prioritization of spiritual objectives, and the conflation of culture and Christian faith traditions with biblical moral mandates has frequently been pernicious. Requiring converts to dress in Western clothes; the types of instruments allowed in worship services; whether or not one can drink wine, dance, or go to movies; whether or not one speaks in tongues and gives other evidences of the Holy Spirit; involvement or not in issues of "social justice"; time and time again what constitutes evidence of spiritual growth and maturity is shaped by culture, doctrine, and theology.[19] In summary, not only is it hard to choose which aspects of discipleship to focus on, what one does prioritize and choose one is subject to bias that may limit its utility in measuring spiritual impact.

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[18] See (*Maturity of a Disciple*, p. 1) along these lines: "You can't hit a target if you don't know what it looks like. Thus the definitions and the objectives need to be precise and visited often to evaluate if they are accomplishing the desired results." See Barna's 2009 report ("Many Churchgoers and Faith Leaders Struggle to Define Spiritual Maturity," 2009) that shows that pastors and churches don't have a clear sense of spiritual goals, of what spiritual maturity means, and a call to a new metrics as a result, and a prediction that because of the underdevelopment of this field, we will see a growth in emphasis on this.

3. Problem of Theory of Change

Third, and related to the first two, it is very difficult in the spiritual arena to trace causality, to define the theory of change that ties together whether and how the activities in which you engage bring about the spiritual impact you are seeking to have. In other words, if one wants to see people grow spiritually in a certain area, then what activities, what strategies, should one implement in order to bring this about, and why does one think that they will in fact bring about the spiritual impact that is sought?[20] To a certain extent, as seen above, specifying a theory of change is difficult for any kind of process that seeks to change people's beliefs, attitudes, and behaviors. However, the spiritual arena seems to be even more difficult for at least three different reasons. First, it has to do with changes at the core of people's beliefs about truth and morality and practices based on those beliefs, and not just about how to better attain and manage resources which is usually the focus of other theories of change. Second, it is an area where we are more aware of the direct role that God plays, and thereby gives us more pause, or should give us more pause, when we seek to draw up our theories of change to make sure that we are leaving room for the working of the Spirit. Finally, third, individuals within cultures and communities are starting from very different positions vis-a-vis where they are in their relationship with God and in their relationships with others, and in the numerous different areas of discipleship. As a result, it is very difficult to draw up a theory of change in the context of working with a group of people that will specify overall objectives and activities that will address the situation of the specific individuals and their own, very personal, processes of discipleship.[21]

4. Problem of Creating Universal Metrics

Fourth, because of all of the above, it is very difficult to come up with a universal set of metrics for spiritual impact that will be relevant and productive across contexts and cultures. Once again, this is a difficulty that is shared with the metrics of any kind of social, as opposed to material, change process since the nature of the social objectives are so context-dependent. This applies even more so, as seen above, to the spiritual side of things. Organizations that wish to try to aggregate results across cultures and contexts will be faced with inherent difficulties in defining similar relevant spiritual objectives in the face of situations and individuals who vary widely in terms of where they are spiritually and who attach different meanings and words to spiritual concepts and categories. In this, there is a temptation to adopt a "blueprint" approach both to the metrics and to the definition of objectives and activities, rather than tailor it to local circumstances, as a way to more easily figure out and report the total impact the organization is having and to apply what works in one place to another. But, this "one size fits all" approach has been shown time and time again to be ineffective at the best, and counterproductive at the worst. The challenge, then, is to plan and evaluate in a way that would give us an overall measurement of spiritual growth the content of which is defined by the context.

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[19] For a description of these different faith traditions and how to use them for a comprehensive approach to individual and church spiritual growth, see (Smith & Graybeal, Original Date 1991, Date of this Edition 1999). See also (M. Cutting & Walsh, 2008; M. L. Cutting, Gebotys, & Onofrei, 2008) and (Ammerman, 1997) who argue that scales measuring religiosity were biased in that they did not use social justice praxis as a manifestation of spiritual growth. See also (Wright, 2008) for his critique of bias, along other lines, in the REVEAL Study.

[20] See (Bonem, 2012, pp. 99-100) for a good exploration of this issue, and the difficulty of determining how inputs lead to outputs in the spiritual area. See also the CCCU Report on Spiritual Formation (*CCCU Report on Spiritual Formation*, 2011) that identified this very point as a major problem: "Moreover, the mechanisms by which Christian colleges may actually stimulate moral and spiritual development are woefully underspecified." (p. xiv). Also, the plan of action was geared, in effect, to identifying the theory of change as well, and to use metrics towards that goal. "This assessment will be designed to work in concert with that effort but with greater attention to specific efforts to link intentional programming to identifiable impact on how students think, live and act. To evaluate which specific programmatic components most produce specific aspects of spiritual formation. To evaluate what aspects of programs best work together to produce the most significant, identifiable spiritual formation. **In short, we want to identify which intentional programmatic mechanisms positively affect which elements of spiritual formation and at what level of success**." (Bold in the original) (p. 17). (Bonem, 2012, p. 98) also observes that things are hard to measure, so you settle for lower metrics that are less meaningful, so you create strategies that fail to lead you to achieve what you want to.

[21] This is not to deny the fact that individuals within cultures may share certain culturally-based characteristics or be pressured to act in certain ways that have implications for spiritual deepening and maturity. See, for example, Titus 1.

5. *Practical Problems of Measurement*

Finally, the measurement process itself, given the challenges identified above, is riddled with practical and theoretical difficulties. First, practically-speaking, choosing what to measure in terms of spiritual impact can be overwhelming, leading to two different problems beyond just throwing up one's hands and not measuring anything at all. It can lead to a bias to measure something that is more easily counted, something that is more amenable to a "quantitative" approach, as opposed to what might be harder to measure yet more important. Or, it can lead to an attempt to measure just about everything and in the process create a huge, unwieldy, time-consuming, and unproductive burden on the organization, its staff, and the people with whom they are working. [22] Second, one is not quite sure what one is measuring at any one point in time with spiritual metrics. Spiritual growth is not a linear process of ever increasing maturity and depth, but rather a journey on which all individuals and communities experience peaks and valleys.[23] Moreover, it is more like many different journeys going on at once and feeding into each other since, as examined above, discipleship covers innumerable areas of life as they are brought under the Lordship of Christ. Times of trial and tribulations or even brief instances of difficulties in one area of life and discipleship, therefore, might affect either negatively or positively other areas of life and discipleship in such a way as to render the results of any assessment difficult to understand, especially if the assessment is more quantitative in nature. The challenge, then, is to design a process of spiritual metrics that is workable and whose purpose and limits are clearly defined and recognized.

6. *Conclusion*

It should be clear at this point that engaging in spiritual metrics presents a unique set of difficulties even for organizations that are committed to systematic methods of planning and evaluation, be they conventional or activities-based. Spiritual objectives are very hard to identify, define, and prioritize because of the breadth of the manifestations of spiritual growth and maturity and because of the cultural, doctrinal, and theological biases that shape the understanding of them. This difficulty in defining spiritual progress is compounded by a difficulty in tracing what causes and leads to spiritual growth, in other words in detailing the theory of change of spiritual growth, which means that it is hard to know and measure whether what the organization is doing is the best way to achieve the spiritual impact it seeks. Finally, given all of this, it is very difficult for organizations to draw up a set of spiritual metrics that will serve equally well across cultures and different Christian traditions and allow for an aggregation of data that is not unwieldy, that takes into account the fact that people and groups are in very different places in their faith journey in the multiple dimensions of discipleship, and that they all experience peaks and valleys on this journey rather than a steady line of progress. While these "methodological" difficulties can be daunting, there are ways of overcoming them, as we shall see below. First, however, it is necessary to review the "organizational" challenges to using and adapting the tools of discipleship for purposes of spiritual metrics, to which we now turn.

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[22] See (Bonem, 2012, p. 112) for a story about how in one case World Vision International overwhelmed itself to the detriment of its work.

[23] See (Powell, 2013; Wright, 2008). See also (Bonem, 2012, pp. 101-102) for the observation that congregations go through "seasons" that might include seasons of "pruning" to make the congregation stronger in the long-term.

2) Challenges of Organizational Type, Capacity, Culture, and Operational Location

The organizational challenges to engaging in spiritual metrics and planning draw heavily on the points that have been made above in this section as well as in the previous one. It is in the organizational endeavor, however, that those challenges become concrete. These challenges are affected by the particular type of the organization, as well as by their capacity, culture, and the places in which they are operating. In what follows, we first look at some important differences between Christian development organizations and missions agencies, on the one hand, and schools and churches on the other, and then consider the challenges of capacity, culture, and operational location.

1. *Organizational Type: Differences Between Schools and Churches, and Development and Missions Organizations*

When it comes to spiritual metrics, there is an important, qualitative difference between Christian schools and churches, on the one hand, and development and missions organizations on the other. Schools and churches are, by their very nature, what one might call "membership organizations." While there are important differences between (private) schools and churches, they so share key characteristics. These organizations have a very clearly defined set of people, "members," who have explicitly or implicitly agreed to abide by the authority of those in charge of the organizations, to follow the rules, regulations, and norms established by them, and who "own" the organizations themselves. Conversely, development and missions organizations are what one might call "service" organizations. They are directed and owned by one set of people, and reach out to and "serve" another much less well defined and constantly changing constituency who pick and choose when, how, and what to be involved in as far as the activities offered by these organizations.[24] There is, therefore, a very different kind of relationship that exists between the development and mission organizations and their "beneficiaries" or "target" groups, and the relationship between the schools and churches and their "members" that is significant for when it comes to planning for and assessing spiritual impact.

This is the easiest to see in churches, for example. The members of a congregation are expecting and demanding that the mission and purpose of the church will be things spiritual, and the pastors, elders and staff of a church have a clear mandate to create activities that will lead to spiritual growth and fulfillment, and to hold the members accountable to doing their part. But Christian schools are pretty much in the same boat. Their members are expecting and demanding that the mission and purpose of a Christian school be education, an education that is focused both on the "technical" and "spiritual" dimensions, and therefore the administration and the teachers have a clear mandate to ensure that the students are progressing on both dimensions and to hold them accountable in terms of that progress. The difference is that a Christian school, as opposed to a church, has an added dimension of mission that takes it beyond what people see as simply the "spiritual" realm, and this dual mission at times is the source of tension and difficulty because the "technical" or "secular" educational mission has a way of being placed first given the societal pressures and value of that education, leading to a drift away from a focus on spiritual growth and assessment. Nevertheless, it is expected that both in a Christian school and in a church, the teachers and pastors will be engaged in directing processes of discipleship, including evangelism,[25] and spiritual growth.

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[24] In some cases, this distinction between the "owners" and "those served" has been cut down by processes that included members of the served community on the decision-making boards of the organization. See, for example, (Bronkema, 1996). However, this is relatively rare.

Things are a bit different for missions and development organizations. Because they are not owned by the people with whom they work, aspects of their missions, purposes, and goals can often be very different from the reasons for why people participate in their activities. They also have little if any sway in terms of holding people accountable, and that sway usually relies on material leverage in the form of resources rather than on organizational norms, rules, and regulations. These organizations tend to be much more limited in what they can do because people will "put up with" a lot less given the difference in relationship, expectations, and mandates that exist. As a result, there is a significant question as to exactly what spiritual impact these organizations, especially development organizations, should strive for.[26] It is not entirely clear that the spiritual objectives of these organizations should be in all cases to mentor and nurture the discipleship and spiritual growth of the people with whom they are working, and to measure their impact in those terms. Rather, even as these organizations hold firm to training their staff and programs share the gospel appropriately, it may be that a spiritual objective that makes more sense would be to help people become involved in local churches or local spaces of spiritual nurture such as Bible studies or other groups rather than attempting to do the discipleship mentoring themselves, given the constraints of "type" reviewed above. However, missions organizations are a bit closer to Christian schools and churches in this sense, because as they are also in the business of making disciples and planting churches, even as in many cases they are combining this more and more with social and material outreach.

2. *Organizational Capacity, Culture, and Operational Location*

There are four main problems, closely related to each other and to an organization's capacity, culture, and operational location, that tend to come to the fore as organizations look to have a spiritual impact and assess it:

1. Organizations may not have clearly defined, planned out, and/or implemented activities geared towards a spiritual impact, nor have wrestled with their theory of change, even in the case of those engaged in conventional planning. Often this is both the consequence and cause of an implicit or explicit tension between evangelism and discipleship.
2. Organizations tend not to have explored or clearly defined the purpose or purposes for engaging in spiritual metrics, which makes it difficult for them to choose and assess which evaluation tools are the most fruitful and productive for their organization.
3. Organizations as a whole, or pockets of people within them, may have a variety of fears and hesitations around spiritual metrics, including viewing it as theologically suspect and organizationally counterproductive, a low priority in the context of scarce resources, and as being too complicated and beyond the organization's competency, leading to resistance, foot-dragging, and a half-hearted undertaking, if at all.

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[25] See below for an exploration of the terms and concepts of "evangelism" vs. "discipleship" and the tension that exists around this in organizations and efforts.

[26] See, for example, (April H et al., 2014), in their exploration of what a spiritual metrics for businesses that are part of the Business as Mission (BAM) movement should be measuring.

4. Organizations may be operating in contexts and locations that are hostile or resistant to Christianity, which complicates even further the attempt to plan for and measure spiritual impact.[27]

In what follows, we explore each of these.

1. Lack of Planning for Spiritual Impact and the Tension Between Evangelism and Discipleship

As stated above, at times organizations are keen to measure and report on the spiritual impact of their programs without first having examined carefully the details of the planning side of the equation. This is true whether they are adopting a conventional approach to planning or an activities-based one, or a mix of both in some cases. To put it in the form of a set of questions, have Christian development agencies, missions organizations, schools, and churches clearly defined what the activities are that will have a spiritual impact, and made sure that their staff are trained to implement them with excellence and faithfulness? Have they wrestled with their theories of change and, in the case of those adopting a conventional planning method, have they spelled them out clearly along with their objectives and indicators? In the case of those seeking both material and spiritual impact, have they considered how the two are related?

The answer to many, if not most, of these questions, can often be a resounding “no.” While many times the conceptual and theological difficulties reviewed above play a large part in explaining this lack of planning, there is one particular tension in evangelical organizational settings which these become concrete: the tension between their commitment to, and definitions of, discipleship and evangelism. This tension has resulted from the fact that the focus of the vast majority of the evangelical movement’s outreach efforts, at least in rhetoric, has traditionally been on evangelism, on “saving” those who are lost, on getting a person to accept Christ,[28] as opposed to discipleship, to getting people to grow in their spiritual maturity. In essence, the most important thing was, and continues to be for many in the evangelical movement, that a person be “saved.” Traditionally, the metric used to judge “success” has been the number of “hands raised” professing Christ, a process some have criticized as focusing on “making converts” rather than “making disciples” (*The Eastbourne Consultation Joint Statement on Discipleship*, 1999; Krejcir; Krow & Wommack, 2004; "Make Disciples, Not Just Converts : Evangelism without discipleship dispenses cheap grace," 1999; Rushton, 2013; Willard, 2001; Wommack). This has been changing, however, not least because of the challenges raised by things like the backsliding of people after evangelistic campaigns, the identical divorce rates between professing evangelicals and non-evangelicals ("New Marriage and Divorce Statistics Released," 2008), and the involvement of Christians in wholesale genocide in Rwanda, leading to questions of when and whether people professing Christ “truly believe” (Block, 1985; Hall, 1998, 2006; Hoag, Rodin, & Willmer, 2014).

Separating evangelism from discipleship, seeing it as something distinct rather than understanding it as being part and parcel of a larger overall process of Christ’s mandate of disciple-making, makes it harder in at least three ways for development organizations, mission agencies, and to some extent churches and Christian schools to engage in thoughtful, insightful, and dare we say faithful planning and implementation for spiritual impact and engagement in spiritual metrics.[29] First, the separation makes it harder for organizations to see and to focus on the complementary nature of evangelism and discipleship and how the Spirit uses both word and deed together to witness to Christ. Loving God and loving neighbor, witnessed to by fruit including holiness, kindness, loving speech, and good deeds that exemplify "The Way" (Acts), are powerful tools that the Spirit uses in combination with the verbal proclamation for the reason for the hope that lies within us to bring people to Christ. As a result, severing the inherent, mutual, and complementary relationship makes it more difficult to "disciple" and train staff for more effective spiritual impact, to plan and create activities that will have a combined spiritual and social and material impact, to prevent an insidious polarization in the organization or between organizations about the respective importance of evangelism or discipleship, and to be used by the Spirit to bring people to Christ.[30]

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[27] Bonem’s Chapter 6 (Bonem, 2012, pp. 97-116) has an excellent analysis from his perspective of the challenge of spiritual metrics for churches, focusing on the following: defining clear results, measurement seems unspiritual, measures can be misleading, not everyone wants accountability, needed skills and tools may be lacking. My list is different, and encompasses his viewpoints, as well as some other ones.

[28] Of course, this was not always the case, as per the history detailed by (Moberg, 1979) and others.

Second, separating out evangelism from discipleship hides from view the fact that spiritual impact and change is not a process that occurs just at an isolated, point-in-time individual level when a "decision for Christ" is made. Rather, spiritual change involves wider social and cultural impacts and changes along a never-ending timeline, making context an extremely important factor for consideration. For example, focusing just on "professions for Christ" to the exclusion of other markers of change makes little sense in some contexts, especially those that are hostile or closed to the Christian message, and does little to honor those called to toil away faithfully in those contexts even as they see few, if any, come to Christ as a result of those efforts. Those efforts may set the stage for a later abundant harvest by others, having led to what can only be called a spiritual impact or change along other lines, such as decreasing the hostility towards Christians and the message and a corresponding increase in the receptivity to the gospel. In short, seeing and understanding a person's decision for Christ and evangelistic activities geared towards that as part and parcel of a wider process of discipling of that person and the social and cultural structures of which they are a part over time, both before and after the decision, opens up a whole new understanding of the possibilities for and nature of spiritual impact and change, which helps organizations to take these into account as they plan, implement, and assess the results of their activities. This approach to "discipling the nations" (Miller, 2001), in fact, has been developed systematically based on what is known as the Engel scale, a scale that ranks the progression of spiritual maturity of people and that has been adapted by a host of mission, churches, and development organizations, as explored by Mark Forshaw in his second article in this volume.[31]

Third, separating out evangelism and discipleship has made it very, very difficult for those interested in integrating evangelism and social action, and in measuring spiritual impact in a holistic way that includes effects on the material, social and psychological aspects of life, to do it well. Since evangelism and its success was defined and measured as a profession of faith, it pressured development organizations, for example, to create a specific strategy for how to present the gospel geared solely towards getting people to make professions of faith rather than to emphasizing the Lordship of Christ over all. It also meant that missions organizations and churches were under pressure to justify their integration of social action in terms of producing converts, leaving little room to explore the relationship and synergy between evangelism, discipleship, good works, and material, social and psychological progress both in terms of planning and assessment. As Rohrs explores in his chapter in this book, this means that development organizations that are serious about planning and measuring their spiritual along with their material impact wrestle with figuring out what the relationship is between the two, and how best to achieve each in the context of the other. As with most other causal relationships, this one is particularly difficult to decipher, not only because it is so dependent on the context, but because there seems to be no particular pattern of relationship, association, and causality that can be established. For example, sociologically speaking, submitting oneself to Christ might lead to an improvement in one's material situation. However, it is also the case that increased riches can bring about a decrease in spirituality, and living a Christian life may lead to a decrease in material wealth. The problem is that because evangelism, spiritual deepening, and material, social, and psychological progress have been separated out from each other, there has been little incentive to research and think through what this means both for theory, theology, and practice.

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[29] Some of what follows mirrors some of the criticism of the Church Growth Movement, which focused much of its efforts on increasing the numbers attending church many times to the detriment of a focus on discipleship. See (Myers). See also (Plueddemann, 1995) for a screed against measurable/numerical objectives and a call for a focus on "vision" that gets at the inner qualities of spiritual life.

[30] For this last argument, see (Stackhouse Jr., 2002). See also (Suttle, 2011), who argues that our divorcing of evangelism and social work hampers the work of the Spirit in bringing people to Christ.

[31] See also (Albright, 2014), especially pp. 39-40, for several other measures as well along these lines used by missions organizations.

In summary, the tension and separation between evangelism and discipleship has made it hard at times for organizations to establish well thought-through activities and objectives of spiritual impact that go beyond simply the profession of faith, and training their staff to accomplish them. It has prevented organizations from recognizing that spiritual impact can be manifest in myriad different processes of individual and cultural change and setting up evaluation processes to explore what these changes are. The tension has also hampered a focus on defining and measuring how social action connects to, fits with, and is a reflection of spiritual progress and impact. All of these consequences of the tension between evangelism and discipleship add to the difficulties identified in the method section, making it a requirement of organizations seeking to be faithful in bringing about spiritual impact to be diligent in their planning of metrics.

2. *Lack of Clarity of Purposes of Spiritual Impact Evaluation and Measurement*

A major problem inhibiting Christian development and mission agencies, churches, and Christian educational institutions from measuring and assessing their spiritual impact well, is their lack of clarity on why they should do so. While many times the organizations have at least an implicit idea of why measuring spiritual impact is or might be important, often they have not clearly debated, discussed, and defined what they want to achieve through spiritual metrics, and have not established goals and objectives for the measurement itself. Why does that lack of clarity make a difference? Because as reviewed above, each of the five potential purposes for which an evaluation is undertaken - improve or market programs, and explore, prove, and advance impact - calls for a particular kind of focus and method in order to achieve it most effectively. A lack of clarity of purpose, therefore, leads to confusion when trying to figure out what to do on the evaluation side, especially when talking about spiritual metrics. Let's take a look at why that is the case.

In an organizational setting where the evaluation purposes have not been sorted through and prioritized, the discussion on how best to engage in metrics will tend to be a struggle since people will be driven by different purposes depending on their interests, roles and responsibilities in the institution. As they look for a way to implicitly accomplish them in one fell swoop because of the scarce time and resources available for evaluation, they will run into what are most likely to be insurmountable difficulties. A quantitative approach to evaluation that gives the donors and other stakeholders facts and figures to create excitement about and support for the organization will probably not be of much use for those who want to use the evaluation to understand how and why they can improve their programs, even though it might give some interesting insight into areas to which more attention needs to be paid. Vice-versa, a qualitative approach focused on how and why activities and objectives should be changed to increase the effectiveness of results at times will not be of as much use to those who are in charge of marketing the organization's programs, even if it does yield some stories that can touch the donors' hearts. And, an "empowerment" or "transformative" approach that hands over the evaluation, and even planning, to the people with whom the organization is working in function of their own processes of progress, runs the risk of not providing information that is of much use for the first two purposes. In the absence of enough resources or programmatic commitment to diversify the evaluation process to accomplish all of these at once, and in the absence of an analysis and awareness that these five purposes have, to a certain extent, mutually inhibiting requirements, the result will be conceptual and programmatic confusion. In short, usually some kind of prioritization needs to be made, and that can only be done if there is clarity around the purposes of the evaluation.

3. *Hesitations Surrounding Appropriateness and Productivity of Spiritual Metrics*

Another challenge to organizations entering into the practice of measuring spiritual impact is the lack of conviction that this will be an appropriate, useful or productive engagement. This hesitation comes from at least five main sources: an ambivalence over whether measuring things spiritual is biblically sound; a nagging suspicion that it may be used in inappropriate ways; a fear that if spiritual assessment is undertaken, the results would reflect poorly on the organization and its programs; a fear that the cost of doing this kind of assessment would take away time and other resources from other higher priorities; and a fear that there is a lack of capacity in the organization to do it well. Again, let's take these in turn.

1. Theological Hesitations

The question of the theology of spiritual metrics, of the biblically-based appropriateness of measuring spiritual impact, is a deep and serious one. While there is significant theological literature on spiritual self-testing geared towards individual spiritual growth, backed by relevant scripture, there is little to no theology that looks at what this might mean in the context of an organization that is, in essence, proposing to measure the spiritual condition and growth of others. Given the difficulties of defining spiritual objectives outlined above, especially those related to the doctrinal, theological, and cultural variability of these objectives, it stands to reason that a suspicion of having one party measure another's spiritual growth is a healthy theological suspicion to have, and that significant work in exploring the theological bases of this kind of assessment and evaluation needs to be done. The third chapter of this book (Crockett), tackles this issue.

2. Hesitations over Potential Misuse

This leads to the second spiritually-related hesitation about engaging in spiritual metrics, which has to do with the possibility that spiritual metrics might be used to pressure people both inside and outside the organization to adhere to the theology, doctrine, and culture that the organization is promoting and that it might be used to provide cover for action taken against them. One could imagine, for example, how the process of creating and engaging in spiritual metrics might include propagating an explicit or implicit "theological message"[32] that, in essence, imposes theological, doctrinal, and cultural beliefs as a condition for access to resources. It is also conceivable that spiritual metrics might be used as an excuse to get rid of staff for any number of reasons. This potential internal and external "misuse" of spiritual metrics is tricky to assess, however, since there are very legitimate and biblically-based reasons for organizations establishing "spiritual" conditionalities both for their staff and partnerships with others. The fact remains, however, that within organizations it is not unusual for people to be suspicious about how spiritual metrics might be used in these ways.

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[32] See (Anderson, 1999) for her examination of "implicit ethical messages" that served as a basis for this analysis of "implicit theological messages."

3. Hesitations because of Fear of Results

Third, it has been well documented in the literature that some leaders are simply afraid that an evaluation of spiritual impact might show poor results and lead to a negative reputation and loss of support (Willard, 2010). This fear is understandable, especially in light of the planning and evaluation analysis carried out above. If leaders and organizations have not taken steps to define clearly their spiritual activities and train their staff to carry them out well; if they have not, under a conventional approach, clearly defined their objectives and theories of change; and if they have not, under an activities-based approach, previously explored what the range and scope has been of the spiritual impact of their programs; then when the question of spiritual impact is raised it is only natural that there will be a high degree of uncertainty over what the nature and extent of the impact actually has been.

4. Hesitations because of Scarcity of Resources

Another hesitation for engaging in spiritual metrics comes from the resource question. Organizations have so many different objectives and priorities, some that appear to be easier to achieve than others, that spiritual assessment and evaluation, especially given the fact that it seems hard to do well, is seen as something that would take time and money away from those other priorities. As a result, the temptation is to shuffle it off to be considered for another day. In short, evaluation of impact falls victim to a cost benefit analysis, something that happens frequently in organizations considering how to carry out monitoring and evaluation of any kind.[33]

5. Not Knowing How to Do It Productively and Faithfully

The last organizational challenge that makes it difficult for development and mission organizations, churches, and Christian educational institutions to engage in spiritual metrics is that they feel they just don’t know how to go about it even though they would like to. As we have seen, this is understandable, because there are no “do it yourself” manuals for spiritual metrics as there are for other kinds of evaluations. Organizations are, therefore, relegated to starting from scratch, attempting to research and develop their own approaches and methods, or to hiring consultants who will help them in this task. But, as we have seen, because of the complexity of the issues involved, all engaged in this field are still learning and devising ways to cope with the challenges that this area faces, and at times get conflicting advice and guidance (Bonem, 2012, p. 104). In short, the process of devising “best practices” for spiritual metrics and their theological underpinnings is still very much a work in progress.

In summary, then, the lack of a strong theological imperative for organizations to engage in spiritual assessment, coupled with suspicions and fears that it might be misused, might give results that damage the reputation of the organization, that it would take precious time and resources away from other priorities and is hard to do well, all combine to give many organizations pause when considering adding spiritual metrics to their list of things to do.

4. Difficult Operational Locations: Closed or Minority Country Contexts

Many Christian development organizations, mission agencies, schools, and even some churches operate in closed or minority country contexts, situations where the sharing of the gospel is either forbidden or very much frowned upon. In these situations, both the planning for and evaluation of spiritual impact is even more complicated because of the restrictions placed on activities that are geared towards promoting Christianity in one way or another and the kinds of conversations and data-gathering that can take place without putting people at risk. Christian development organizations, mission agencies, and schools have taken different approaches to how they seek to have a spiritual impact in these difficult country contexts. Most often they rely on using their material resources and programs to leverage their presence in the country to provide services in a way that witnesses to their faith, and opens up opportunities for their staff to verbally share the gospel and its implications on an individual level.[34] Much of the spiritual impact in these situations has to do with what was described above, where because of the witness of these faithful servants, hostility to Christianity is diminished, friendships are created, local people are challenged in their perspectives and assumptions about their own faith and faithfulness and what that means for their actions, and about the truth of Christ. However, as stated at the beginning of this section, measuring these kinds of changes is particularly difficult, and is a significant reason why most have not even attempted it.

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[33] See (Bonem, 2012, p. 104) for how the question of whether it is really worth it comes to the fore in organizations that lack skills and tools.

IV. Towards a "Best Practices" Framework of Spiritual Metrics

Introduction

Prayerfully discerning whether, why, and how to go about engaging in spiritual metrics may appear to be a daunting task, given all of the challenges enumerated above. And, to a certain extent, this is as it should be: assessing the relationship that people have with God and the impact that has on their relationships with themselves, others, and God's creation is not something to be taken lightly. We are convinced, however, that engaging in spiritual metrics is not only feasible, but also enjoyable, exciting, and something that honors God, and that doing so holds the potential for organizations to walk more effectively with their staff and the people with whom they work in facilitating processes of making disciples.

How then, to go about this given the very real challenges? In what follows, we will give a quick overview of the tools that have been developed for spiritual assessment, and consider their relevance for development agencies, mission organizations, educational institutions, and churches, something that Steve Bird, Phil Collins, and Scott McConnell explore at more length in their chapters. Then, we will proceed to trace out what we believe to be the principles and practices that make most sense given the challenges, constraints, and promises we have identified, drawing on the case studies in this book presented by Varys and Dejean, Rohrs, Parkinson, Bird, Gravelle, and Forshaw et al. and other recent experiences in the application of spiritual metrics. It is our hope that these suggested "best"[35] principles and practices will provide a starting point for discussion and praxis, and continue to be honed through ongoing discussion, theory building, and practice that we will attempt to capture through the spiritual metrics website and list-serve that we have set up as part of this endeavor (www.spiritualmetrics.com).

Spiritual Assessment Tools

As mentioned on the first page of this chapter, there is certainly no shortage of spiritual assessment, growth, and management tools and approaches for those interested in what can be called the broad area of "discipleship" that encompasses the concepts of spiritual growth, spiritual development, spiritual formation, spiritual transformation, spiritual fitness, spiritual maturity, spiritual vitality, spiritual disciplines, spiritual mentorship, spiritual directorship, faith development, growth in faith, and faith maturity, among others. What do these tools actually look like, and how do they work?

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[34] There are a variety of different models for working in close countries, including the "Business as Mission" model (Bronkema & Brown, 2009), and one that establishes an "inter-faith" approach (Backues, 2009).

[35] For a good caution on the attempts to discern and engage in "best practices," see (Snowden, 2004).

There are at least three ways that these tools can be grouped and summarized. First, the tools have generally been developed with one of three particular target audiences in mind, even though some of them may target several of the audiences at once: individuals, small groups, or churches. Second, the tools have been developed based on specific "biases" around what is most important in terms of content. On the one hand, tools are more or less comprehensive in trying to get at what seem to be the three basic elements that underpin the definition of discipleship: spiritual knowledge, which includes "beliefs," practices tied to that knowledge, which include praxis in thought and action, and the emotional dimensions of spirituality. On the other hand, the actual detailed content within these categories varies significantly as would be expected from our analysis above of the multiplicity of spiritual indicators. Third, these tools tend to either focus just on assessment, whether it be for compiling information purely for research purposes or for personal or corporate awareness, or they combine the assessment with ways to craft plans for change, ranging from personal spiritual growth plans to church management and strategic planning. In what follows, we take a quick look at some of these tools, leaving a more comprehensive treatment of them to Bird and Collins in their chapter in this volume.

Older Tools

A good place to start is with Sappington and Wilson's (Sappington & Wilson, 1992) summary of six different tools for measuring spirituality and spiritual maturity ranging from 1967 to 198, especially their chart on pp. 48-50 that synthesizes the elements and potential uses of the tools. Three out of these six measurement tools – the Religious Orientation Inventory, Spiritual Well-Being, and Spiritual Maturity Index - are primarily for research purposes, while the other three – Christian Life Assessment Scales, Religious Status Interview, and The Spiritual Profile – are designed to use the results for individual spiritual growth and change plans, and most of them consist of somewhere between 20-30 questions with responses given on scales that range from 1 to 4 to 1 to 6. Their points of emphasis and content are significantly different from each other. The Religious Orientation Inventory focuses on the people's motivations and the extent to which they subordinate their personal motives to their religious precepts with an ongoing reflection on both. The Spiritual Well-Being tool is structured into a vertical and a horizontal dimension, measuring the extent to which there is a sense of well-being in one's relationship to God and to what degree there is a sense of life purpose and satisfaction with everyday life and relationships.[36] The Christian Life Assessment Scales build off of the "Fruit of the Spirit" in Galatians 5:22-23 to focus on four areas of relationship: toward self, God, others, and to ministry and service. The Religious Status Interview focuses on eight self-conscious faith components: awareness of God, acceptance of God's grace and love, being repentant and responsible, knowing God's leadership and direction, involvement in organized religion, experiencing faith, being ethical, and affirming openness in faith to growth. Finally, the Spiritual Profile, created from within the Catholic tradition, also has eight areas of emphasis: regard for order set by God, appreciation of balance between new and old forms of ministry and liturgy, intellectual curiosity and inquiry, desire for personal and emotional contact with God, awareness of own feelings and life with regard to God, satisfaction with lives and ministry, self-esteem and work, and variety of ministry functions.

Tools Focused on Individuals

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[36] This tool does not claim, however, to measure spiritual maturity.

Five other, more recent tools also focus on getting individuals to “self-test” themselves and design plans for their individual spiritual growth, and present additional variety in their points of emphasis and focus. Perhaps the most detailed is the Christian Life Profile Assessment Tool (Frazee, 2005), composed of 120 questions on a six-point scale designed to measure thirty “core competencies” in three categories of “beliefs,” “practices,” and “virtues,” which in turn indicate the quality of relationships with God and others. The core competencies in the area of practices include worship, Bible Study, and giving away time, money, faith, and life, while in the area of virtues include love, joy, peace, patience, kindness/goodness, faithfulness, gentleness, self-control, hope, and humility. The workbook also includes an assessment questionnaire of 40 questions on virtues to be filled out by three people who know the individual, and based on one’s personal scores in the competencies and the scores by the others, a personal plan for spiritual growth is to be created.

A second recently created tool, by Lifeway, the Spiritual Growth Assessment Process (2006), has some similarities with the Christian Life Profile Assessment Tool in both structure and content, even though the terminology is different. It consists of five different “Spiritual Disciplines” – Abide in Christ, Live in the Word, Pray in Faith, Fellowship with Believers, Witness to the World, and Minister to Others – with ten questions covering each of the disciplines for a total of 60 questions on a five-point scale. It also has a questionnaire on the disciplines to be filled out by three others who know the person, and directions and guidance for a spiritual growth plan, including suggestions for activities to be taken in each one of the disciplines for growth.

A third tool, the Spiritual Fitness Test (*Spiritual Fitness Self-Test*, 2010), apparently developed by Oake Pointe Church (*Week One Daily Training Tips: Welcome to God’s Gym* 2010),[37] is a self-test comprised of fifty questions on a six-point scale that measures five areas: knowledge, defined as a grasp of spiritual truths; discipline, defined as the practice of spiritual habits; wisdom, defined as the application of spiritual principles to life; fruit, defined as the spiritual impact one makes on the world; and character, the development of Christ-like attributes. The questions ask about very specific knowledge and actions, and the results are geared towards helping “you see what you need to do to beef up your faith.” (*Spiritual Fitness Self-Test*, 2010, p. 1).

A fourth tool, the Christian Character Index, developed by Mike Zigarelli, a professor at Messiah College, was designed both for individual self-examination as well as for churches and Christian schools to estimate “the character strengths and weaknesses of their members / students” (Zigarelli, p. 2). Based on the list of the “fruits of the spirit” in Galatians 5,and supplemented by the list in Colossians 3, this tool is designed to assess seven “critical” Christian virtues - joy, patience, kindness, faithfulness, gratitude, forgiveness, and compassion – and one overall Christian character score, based on the average of the seven, that is labeled as “love” (Zigarelli, pp. 2-3). Although the tool is proprietary, a version of the assessment questionnaire is available on the web ("Christian Character Index,"), and consists of thirty five questions on a nine-point scale.

Finally, one additional proprietary tool is worth mentioning, even though the tool itself was no longer available as of the writing of this chapter. Called “Monvee,” “a loose translation for the Latin words for “one life”” (Parks & Bankord, 2011, p. 206), and connected with John Ortberg’s publication of “The Me I Want to Be” (Ortberg, 2010; Parks & Bankord, 2011, p. 211) this tool consists of twenty-two questions that synthesize an original 720-question version, aiming at identifying three key characteristics of an individual: their spiritual pathway – activist, contemplative, creation, intellectual, relational, serving, or worship; their learning style – auditory, classroom, social, verbal, or visual; and their personality – reformer, helper, achiever, individualist, investigator, loyalist, enthusiast, challenger, or peacemaker. Based on the premise that God has created each individual with a unique "frequency," a unique way of connecting with God in which these three characteristics come into play, and that this frequency is blocked by a variety of factors that are linked to one's personality, the tool assesses and identifies the personality of the individual taking the test. The results of this test are then used to craft a plan for connecting with God on the individual's frequency that involves four key areas of action: the mind, time, relationships, and experiences.

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[37] It may be that this drew its inspiration from (Crawford, 1998). For a review of Crawford’s work, see (Yount, 2000).

Tools Focused on Groups and Churches

The tools mentioned above were developed to specifically assess and measure levels of spirituality, usually with a particular focus on helping individuals craft plans to grow in their spiritual maturity. At the same time, there is a significant body of spiritual assessment tools that have been developed to be used in groups and churches, particularly by those interested in discipleship, spiritual formation, and church management. It is beyond the scope of this chapter to review them in any detail, but some are worth mentioning to give a sense for how the issue has been approached at the level of those actors.

On the spiritual formation and discipleship side, there are three particularly interesting tools that jump out. The first is Smith and Graybeal's Spiritual Formation Workbook (Smith & Graybeal, Original Date 1991, Date of this Edition 1999). As with many other spiritual formation books, it integrates assessment questions with a host of spiritual reflections and disciplines. However, it does so in a way that draws intentionally from what it labels as six Christian "traditions" or "movements" in the church: the contemplative (prayer-filled), the holiness (virtues), the Spirit-empowered (charismatic), the compassionate (social justice), word-centered (evangelical), and the sacramental (incarnational). As a result, its approach tends to mitigate the criticisms to which other less-holistic tools are subject, especially those that downplay ethical action inspired by faith (Ammerman, 1997; M. Cutting & Walsh, 2008). The second is the "Authentic Discipleship" documents ("Authentic Discipleship,"), which define spiritual maturity as being made up of five aspects: biblical literacy, spiritual formation, spiritual disciplines, threshold experiences, and five spiritual senses, the latter being made up of a sense of forgiveness, identity, eternity, wonder, and presence (*Maturity of a Disciple*, pp. 2-4). These aspects are considered to have "both objective measurable components and subjective more intangible components," which means, according to the authors, that "we should resist the tendency of desiring a definitive analytical tool to measure maturity "and that measurements "are best left for personal evaluation on[sic] the disciple before God and perhaps with the loving help of a spiritual coach or mentor." (*Maturity of a Disciple*, p. 5). The third set of "tools" are a whole set and series of survey information gathered by the Center for Bible Engagement with the aim of helping "people grow spiritually by learning from them what helps and what gets in the way."(Center for Bible Engagement). These surveys target the spiritual landscape of individuals around the globe, their engagement with the Bible, children and youth, Christian media, churches, and the issue of pornography (Center for Bible Engagement), and the Center has used the information from these surveys to create individual, group, and church curricula and plans for Bible engagement geared towards the "revitalization" of faith and to "strengthen and encourage" people along their unique spiritual journey" (Center for Bible Engagement).

On the church side, there are also several tools that stand out. While most of them are part and parcel of sets of overall church management books, counsel and tools, the one that is most directed towards spiritual metrics is the REVEAL approach that is best summarized in Hawkins and Parkinson's 2011 publication (Hawkins & Parkinson, 2011) and that is the focus of Parkinson's chapter in this book. Also a proprietary tool, the REVEAL questionnaire helps churches assess how many people in their congregation fall into one of four segments along a spiritual continuum - exploring Christ, growing in Christ, close to Christ, and Christ-centered – each of which have their own particular characteristics. This assessment is accompanied by a theory that there are four catalysts that move people in their spiritual growth: spiritual beliefs and attitudes, organized church activities, personal spiritual practices, and spiritual activities with others(Hawkins & Parkinson, 2011, p. 107). Based on all of these, the REVEAL tool is used to assess each congregation and provide them with a "spiritual vitality index," that then helps the church to draw up specific plans for improvement.

In terms of other tools and advice directed towards church management, there are three that pay significant attention to spiritual metrics. The first are the materials related to the "Vital Congregations Planning Guide" coming out of the Global Board of Discipleship of the United Methodist Church that include both goal setting and results-measuring suggestions in the areas of "reach out," "nurture," "equip," and "send" (*Metrics and Measures for Christian Formation and Discipleship*, 2011, pp. 7-8). Another useful work along these lines is Chapter 6 of Reggie McNeal's "Missional Renaissance" entitled "Changing the Scorecard From Measuring Programs to Helping People Grow" (McNeal, 2009, pp. 111-127) in which he lists host of measurement indicators in the areas of prayer, personal growth development, leadership, time, finances, facilities, and technology, many of which are directly related to spirituality. Finally, perhaps the best summary chapter along these lines is also Chapter 6 in Mike Bonem's "In Pursuit of Great AND Godly Leadership" entitled "Do You Measure What Matters" (Bonem, 2012, pp. 97-116). While it does not necessarily add a great deal in terms of concrete insight on what should be measured, it has an excellent summary of the nuts and bolts of metrics, reviews concisely the barriers and pitfalls to metrics, and argues convincingly the value of measurement if done in a way that is appropriate for each situation, and with relative modesty: ""What matters is not finding the perfect indicator, but settling upon a consistent and intelligent method of assessing your output results, and then tracking your trajectory with rigor." We will never find a perfect indicator for spiritual growth or congregational health, but we can strive for a "consistent and intelligent" set of metrics" (Bonem, 2012, p. 109, citing Jim Collins (2005, p. 5)).[38]

Towards a Set of Best Practices

What then, might an "intelligent" set of metrics, a "best-practice" approach to spiritual metrics, look like for Christian development agencies, missions organizations, schools, and churches? As should be obvious from the above, there is nothing even remotely resembling a "one-size fits all" answer to this question, or an established set or "bank" of indicators that can be marshalled for the multiplicity of missions, purposes, activities, and contexts that characterize the different actors. However, despite the complexity involved, we do believe that there are ways of going about spiritual metrics, certain approaches, principles, and methods, that are both faithful and useful. This last part of this paper explores what they are, under the label of "best practices."[39] This section, of course, builds on and is bolstered by the "case study" chapters in this book written by Varys and Dejean (Tearfund), Parkinson (REVEAL), Rohrs (Hope International), Gravelle (The Seed Company), and Forshaw (GSI).

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[38] For a summary of spiritual metrics, labeled "spiritual outcomes," with a particular focus on business as mission (BAM) that draws on several different streams of literature, including missions and development, see (Albright, 2014, pp. 38-48)

[39] It is the case that the term "best practices" has come in for some criticism, since it seems to bolster a "professionalism" and an approach that is overly secure and confident in the technical nature of social change. See (Snowden, 2004), for example. However, these "best practices" are heavily focused on principles and

Best Practices in Measuring Spiritual Impact

As should be obvious from the above, it is quite difficult, if not impossible, to engage fruitfully in spiritual metrics if the planning side of the equation has not been factored in. It should also be obvious that it is impossible to prescribe what particular kind of planning and assessment approach will be the most appropriate for any organization and actor, since they will be so contextually dependent. However, there are certain principles or best practices that can be identified that will help organizations to prayerfully discern how best to go about this in terms of yielding the most fruit. As hopefully has been made clear, these principles and practices have both to do with planning and evaluating, since one without the other makes little sense. The first three best practices, therefore, focus mostly on planning, while the rest focus more on the assessment side. As will be noticed, while there is a heavy emphasis on a qualitative approach, in most cases the suggestion is that having some element of a quantitative approach as well, employing, therefore, a mixed methods strategy, will provide the best results.

1. In "Conventional" Planning Situations, Clearly Define and Prioritize Spiritual Goals and Activities, and Define the Theory of Change

As we reviewed above, there are different ways to approach the planning exercise. One way, the "conventional" way, is to lay out clearly the spiritual goals one wants to achieve, the activities designed to achieve them, the indicators that will show that they have been achieved, and the way the indicators will be measured. In the case where it is believed possible and fruitful to establish clear spiritual impact goals and indicators, hopefully after a process of deep reflection on the complexities and challenges of doing so outlined above, then these should also be clearly defined, prioritized, and the theory of change that is associated with them, the reasoning behind why the activities will lead to the impact, should also be clearly defined and laid out. An example might be a church, such as one that has used the REVEAL method, that wants to move people along the spiritual continuum described by REVEAL, based on the baseline study they have done of their congregation, and use spiritual growth activities and the measurements provided by REVEAL to accomplish this. Another example might be in a situation where there is a particular sin of commission or omission that is prevalent that people feel needs to be tackled, with spiritual impact activities planned with the goal of diminishing people's participation in that particular kind of sin, and the spiritual metrics in this case evaluating whether the activities are in fact leading to that kind of impact, and to what degree. A third example might be a situation, mentioned above, where a development organization does not feel that it has the capacity to provide spiritual mentorship to the people with whom it is working, and therefore sets as a goal the channeling of people to local churches, Bible studies, or other kinds of spiritually nurturing activities outside the scope of its programs.

2. In "Activities-Based" Planning Situations, Clearly Define and Implement Activities Leading to Spiritual Impact

Another way is to go with a more "activities-based" plan, in which an activity or a set of activities intentionally geared towards a spiritual impact have been decided on for whatever reason, but the spiritual impact itself is not or cannot be defined beforehand. All organizations and actors should clearly define the activity or set of activities they believe will lead to a spiritual impact and make sure that they are implementing that activity or activities prayerfully, with intentionality, and with the highest

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approaches, rather than concrete tools, and emphasize the need for humility and the fact that ultimately, the final results are in God's hands, not ours'.

level of quality possible. In cases where it is felt that it is difficult, if not impossible, to define and plan out what the impact itself will be, which is likely to be in the majority of situations, it is important for the organization and those involved to reflect on and describe why they believe this to be the case, since it helps open them up to the numerous potential manifestations of impact and it also helps organizational stakeholders to understand the importance of this particular kind of planning approach that leaves outcomes to be discovered. An example might be a mission organization engaged in Bible translation, such as the SEED Company, where they feel clearly led to the activity of Bible translation without knowing exactly what the spiritual impact will be. In SEED's case, as detailed by Gravelle in this volume, they have developed a sophisticated qualitative approach to measuring impact that relies on stories told by the tribes that have benefited from the Bible translation, organizing the spiritual impacts mentioned by the people in the tribes into several different kinds of spiritual impact categories that help SEED and its staff make sense of them and feed them back into the activities that surround the Bible translation effort itself. Another example might be of a development organization that trains its staff to share the gospel in the work that they do, based on insights and tools developed from the Engel scale that seek to move the person through a spiritual progression based on what their attitude and understanding is of Christianity, such as the Community Health Evangelism (CHE) approach(Rowland, 2001) or the IHS Global efforts (*Saline Process: Participant's Workbook*), or that intentionally engages in "good works" in a country in order to bear witness to Christ, and then seeks to measure the impact knowing that it is impossible to establish what it will be beforehand because of the difficulties explored above.

3. Clearly Define and Prioritize the Purposes for the Monitoring and Measurement of Spiritual Impact

As part of the planning process itself for spiritual impact, organizations should clearly define and prioritize the purposes for why they wish to monitor and measure the spiritual impact of the activities in which they are engaged. As explored above in detail, if the purposes of the evaluation are not clear, it will be much more difficult to define appropriate methods and focuses to accomplish those purposes. One would hope that the primary purposes for conducting spiritual metrics would be to explore the extent of the impact and feed back the information to improve the programs, while also seeing to what degree one could use the evaluation to also advance the impact. This would leave the "marketing" and the "proving" function as lesser priorities, but there is no doubt that organization demands may lead the "marketing" function to move up the prioritization latter significantly. Given, however, that the kind of information gathered to fulfill the other purposes can be used for marketing purposes, it may be that relegating the latter to a lesser priority might be more productive overall.

4. Based on the First Three Best Practices, Clearly Plan Out and Implement the Focus and Methods of Spiritual Metrics

Linked to the previous best practice, organizations should clearly plan out and implement the way they are going to engage in spiritual metrics, guided by the purposes for those metrics that they have defined. What will this look like in terms of options and possibilities for best practices? In what follows, we take each purpose for spiritual metrics identified above and briefly explore the methods and focuses that might be most appropriate. It is important to point out that planning for spiritual metrics is bound only by one's creativity, and there are many, many ways that one can mix methods and focuses depending on particular context, situation, and purposes chosen. Because of this, what is put forth below are general guidelines, and is very short on specifics. Finally, in all of this, it is always good to keep in mind that a periodic evaluation of the spiritual metrics process itself, an evaluation of the evaluation, can prove to be very useful.

1. Purpose: Exploring Spiritual Impact

In situations where there are clearly defined “spiritual” activities to which organizations are committed (e.g. Bible translation, training staff to share gospel appropriately, “good works” that bear witness) but where the spiritual impact is uncertain, a main purpose of spiritual metrics should almost certainly be to explore the spiritual impact that results from those activities. That exploration will also almost certainly have to be a qualitative approach, especially at the first stage, based on interviews and story-telling rather than any kind of quantitative survey, since the latter depends on already having identified what the impact is or is likely to be. This kind of qualitative approach will also allow for an exploration of whether, how, and why the activities led to the particular impacts identified, allowing the organization to explore the chain of change as well, and can be used also for a randomized controlled trial in order to “prove” that the impacts occurred because of the activities carried out by the organizations, and will even allow for a quantification of results based on that qualitative data. The organization that has most developed and refined this approach in an open country context is The Seed Company, the details of which are described by Gravelle in Chapter 9 of this book, and which also lead into the second purpose described in this section, that of improving impact.

In a closed or a minority country situation, since the activities geared towards producing a spiritual impact will most probably focus more on individual relationships and moving people along the Engel scale mentioned above, rather than any overtly “Christian” ones, the plan for spiritual metrics would probably have to be based more on generating conversations at the individual level and intentional observations of individual behavior that explore changes in relationships, knowledge, attitudes, and behavior around things Christian and spirituality as a whole. The results for at the individual level could be aggregated to provide a measurement of overall impact, and both in this context as well as in friendly contexts it will be important that baselines be established for comparative purposes. This kind of assessment would also feed into accomplishing the next purpose of evaluation: improving the impact of the spiritually-focused activities.

2. Purpose: Improving Spiritual Impact

Both in “activities-based” planning as well as in a more “conventional” planning approach where the outcomes of the activities are specified, a main purpose of monitoring and evaluation might be to determine the degree to which the impact of those activities might be improved and how to go about doing that. Once again, the method for this kind of measurement and assessment will almost certainly have to be mostly, but not necessarily all, qualitative, ranging from interviews to storytelling, since a quantitative approach will generally not yield an answer to the “why” and “how” questions that are essential to understanding whether the activities were carried out as planned, whether they had the impact desired, and/or how the impact they did have might be improved (Hoag et al., 2014, pp. 9-10). In this kind of evaluation approach, it will be essential to make sure that staff are held accountable for implementing the spiritual activities with the highest degree of quality, as well as providing spaces for them to give their insights and opinions on how and why the activities might be improved. In fact, an evaluation approach that is designed to facilitate reflection by both staff and those involved in the programs stands the best chance not only in garnering information that will be most useful in improving the activities and their impact, but also in advancing the spiritual progress both inside and outside the organization, which ties in with the next main purpose on which spiritual metrics could focus.

3. Purpose: Advancing Spiritual Impact

As examined in the second section of this chapter, one of the main purposes of evaluation can be to advance the goals and objective of the program itself. In other words, simply carrying out an evaluation on spiritual impact can be used to further advance that spiritual impact. As with the previous purpose, the most effective way to accomplish this “transformative” evaluation purpose is probably through a qualitative approach, since interviews and storytelling generally require a degree of reflection by the participants that can have an impact on their spiritual insights and commitments. However, it may be that mixing in elements of a quantitative approach will also help lead participants to identifying patterns and reflect on them that may be missed through a purely qualitative study. It will also be best served by a highly participatory approach, in which the participants are fully engaged in establishing the purpose and methods for carrying out this evaluation.

4. Purpose: Marketing Programs

As reviewed above, a main purpose of evaluation can be to gather information to market the programs of the organization. Often, organizations believe that the most effective information that can be gathered along these lines is quantitative information, which leads them to attempt to establish standardized spiritual impact indicators across cultures and contexts so that they can report standardized numbers for their programs as a whole. However, as we have seen, this approach is fraught with difficulties because of the variety and complexity of the spiritual domain, and an approach such as this tends to run the risk of missing more than it finds out. There is no need to repeat here the difficulties associated with quantitative approaches to spiritual metrics, since they have been covered at length in this Chapter, and organizations might want to consider a more qualitative approach to achieve this purpose as well, or at least a mixed methods one. It is also beyond the scope of this chapter to explore the ethical considerations in making this a primary focus of evaluation. However, if an organization is bent on gathering quantitative data for donor reports, and especially if it is seeking to do so across cultural contexts, a best practice along these lines would be to employ something along a modified Engle scale that is covered in detail in Forshaw's chapter in this volume.

5. Purpose: "Proving" the Impact of Programs

As stated above, the movement to "prove" that results are being achieved due to the organization's efforts and not to other contextual factors has put significant pressure on some organizations to do so by engaging in Randomized Control Trials (RCTs). When it comes to the area of spiritual metrics, this purpose also has significant problems both theologically and scientifically. "Proving" that a spiritual impact occurred because of one's efforts carries with it at least a whiff of pride, leaving little if any room for attribution to the role of the Spirit in the changes that occurred. When joined with the scientific limitation that this proof will not tell you what exactly worked and why that can be applied to other cases (Auerswald, 2011; Cartwright, 2007), this purpose becomes even more suspect. However, there may be cases when it might be useful to use an approach that compares changes in those who were engaged in the programs and those who were not, an approach that is at the root of RCTs, if the motive for that approach is to discern information that will help accomplish some of the other purposes of evaluation and assessment. In this case, as with the others above, a "mixed methods" approach that combines the quantitative with the qualitative is probably the best way to go about it.

5. Give Special Consideration to Engaging in a Facilitated, Participatory Process of Planning, Implementation, and Evaluation

For spiritual impact activities, objectives, theory of change, and measurement to be defined and implemented in a way that is more relevant and fruitful in and across cultures and contexts than not, it is generally the case that people who will be engaged in this process of spiritual change and growth should have a major say in their definition. Obviously in closed country contexts and some other situations this may be more difficult, but the challenge presented by the literature on participatory development is a crucial one to take into consideration: a facilitated process in which the people themselves are leading the process of planning, implementation, and evaluation stands a much better chance of having greater impact and being more sustainable. In this process, the facilitator can play a key role in enriching the process of planning and evaluation by helping people examine the plethora of ways that people can and do grow spiritually, the kinds of things that others in other cultures have found to be important in the definitions, and the cultural blind spots that might be operative in the discussion around discipleship.

This approach may be challenging from an organizational standpoint for a variety of reasons. Organizations tend to want to standardize and replicate processes across contexts to better manage information and resources. Many times there are significant pressures from donors who want to see particular kinds of information and indicators and who are operating on timelines that don't quite fit with best practice timelines. And, there is always the temptation to want to try to control processes because of risks that are perceived and real. However, as stated above, given that a less-participatory approach to evaluation has generally been the norm, a best practice for spiritual metrics requires at least a serious consideration of a more participatory approach.

6. Start Small, and then Scale Up if Time and Resources Permit

One of the things that most frustrates the staff of an organization that is already going full steam is to have additional responsibilities for evaluation to be piled on them. It is much better to start with something small, something very small, than to design large plans and do nothing at all, or to do it poorly. This is the same with spiritual metrics. Generally, once something small is started, it is much easier to then scale it up, than it is to have failed at something big and then try something else. Also, because of the complexity of the field, it will usually not be apparent from the beginning what the best methods might be, and it may take time to identify the right combination of qualitative and quantitative approaches.

7. Use the Results in a Way that is Ethical, Sensitive, and Loving

The essence of engaging in spiritual metrics is to gather information that will tell you one or more of four things: the kind of impact that the programs are having; the extent of the impact they are having; whether, how, and why the activities are having the kind of impact desired and what can be done to improve them; and "how well" people are doing in the spiritual realm. Any of this information, but especially information that falls into the latter category, has the potential to be sensitive and to be used in ways that are less than ethical. The best practice in terms of the use of this information should follow relational and theological lines that are in keeping with the best of our obedience to Christ's commands. At the very least, this means that a discussion of how, and when information is shared, what kind of image it portrays of the people involved, and respect for the confidentiality of the participants, should constantly be on the agenda, with decisions made with these points fully in mind.

IV. Conclusion

It is our hope and prayer that this review of the basic elements of planning and evaluation, how these apply to spiritual metrics and help explain the challenges involved, and the suggestion of best practices will be useful for those seeking to implement evaluations of spiritual impact of their programs. The rest of this book seeks to provide more detail on the theological and practical implications of what this chapter has reviewed. We encourage you to explore these chapters with a spirit of loving critique, and to become involved in the attempt to continue refining the thoughts, arguments, and practices that this book encourages. Please do take the time to visit our website at www.spiritualmetrics.com to peruse additional resources and to participate in building those up, and may God bless you richly as you continue to seek to be faithful with that which He has entrusted you.

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